

Microsoft IT

Dynamics CRM

IMS APP Deployment Document



DYNAMICS 365 MODERN IMMIGRATION MANAGEMENT SYSTEM

The solution provides end-to-end scenario to manage and track immigration cases for their employees.

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1.Summary

1.1 Overview

Microsoft AppSource is our new destination to enable business users to explore and use line-of-business SaaS apps from Microsoft and our partners. Users can also discover add-ins for Microsoft business apps, like Dynamics 365, Power BI, Office and more. Through AppSource, ISVs (app publishers) and other partners can reach a broad range of customers right where the users are either through the AppSource portal or within the context of the Microsoft services they're already using.

1.2 Document Overview

This document describes the components of Immigration Management System (referred as "IMS" in the document) App and its related information including the prerequisites to be made available in the system before proceeding with the IMS App Solution installation and steps to download and import the solution.

This is a living document that will be used to support the CRM application and its associated portal. There are two deployment guides which describe the complete process of deployment of IMS applications:

- IMS Deployment Guide
- Forms Deployment Guide

New Customers who are installing IMS application for the first time need to follow the IMS deployment Guide first and then follow the forms deployment guide later.

Existing customers who already have installed IMS application in their organisation can skip this document and directly follow the forms deployment guide.

2. Prerequisites

As a part of prerequisites to install the IMS App, the below solutions must be installed or imported into the user's CRM organization. The user must login with Office 365 Administrator account to install the below apps.

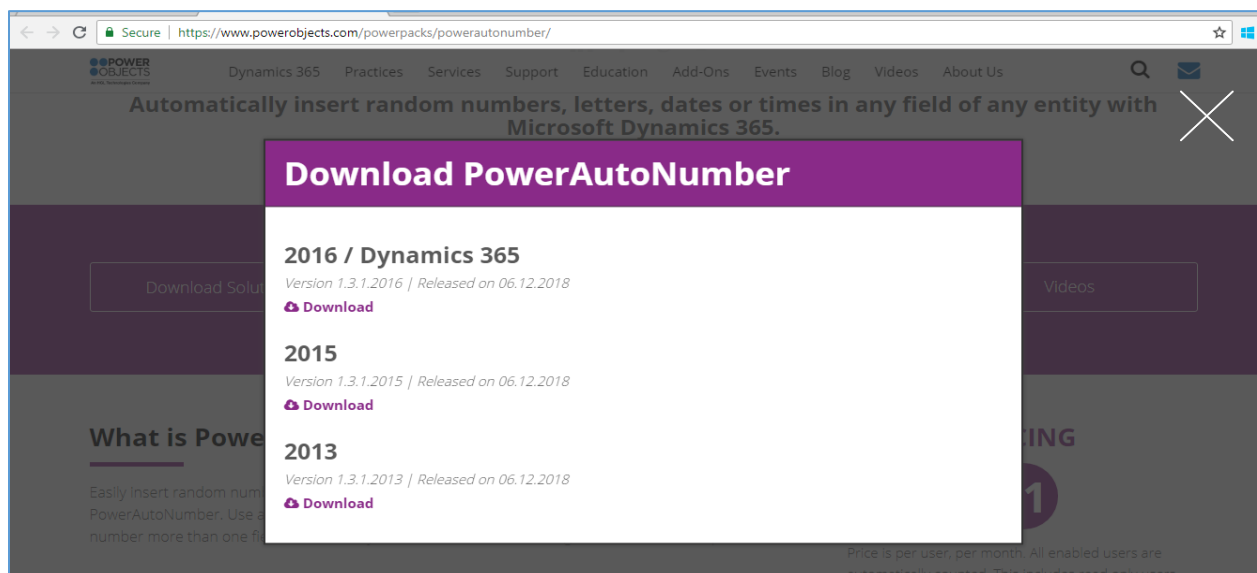
- Power Auto Number
- Data Export service
- Email Lab Alerts
- Voice of Customer
- CRM Hub Installation
- Portal Installation and Configuration(Custom Portal)

2.1 Power Auto Number

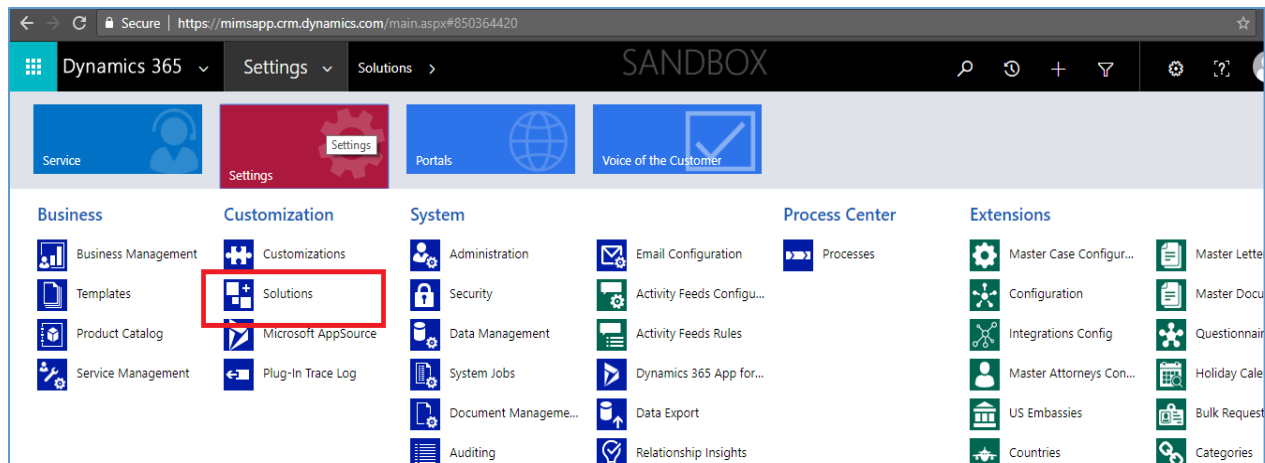
Power Auto Number is an app that enables automatic insertion of random numbers, letters, dates or times in any field of any entity in CRM. The app enables the use of combination of numbers, letters and dates in the CRM fields and provide the ability to number more than one field in each entity. Random numbers are guaranteed to be unique. Power Auto Number is used in this application to create a unique identifier in Foreign national entity.

The power Auto number solution can be downloaded from the below **web site**.

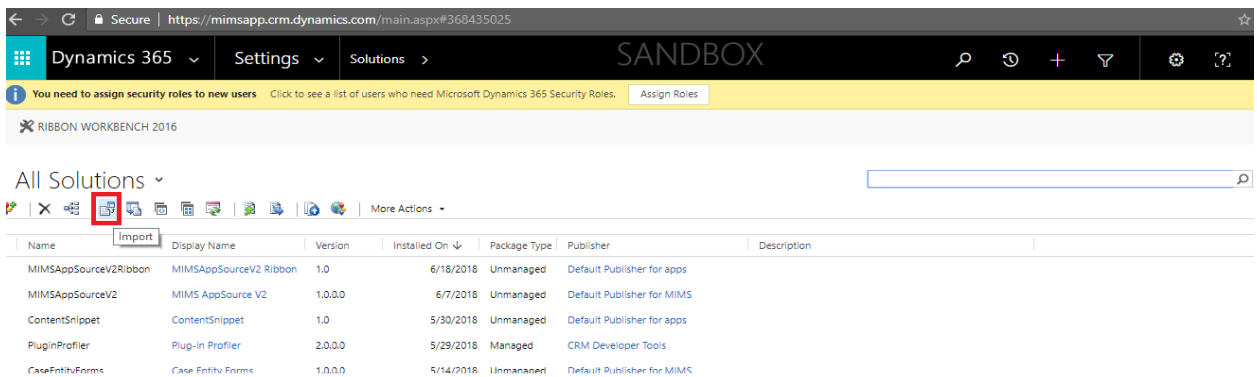
<https://www.powerobjects.com/powerpacks/powerautonumber>



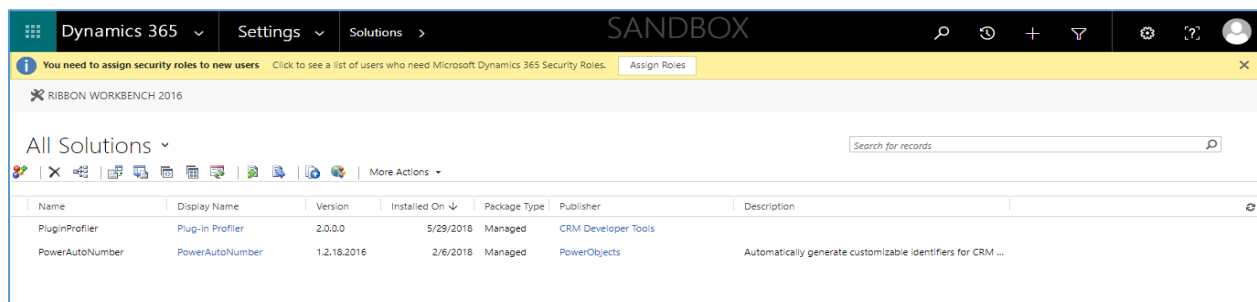
Import the same into the CRM system by navigating to **Settings - > Solutions**.



Click on **Import** button in the solutions page.



After importing the Power auto number, the same is available in the below imported list.



2.2 Data Export Service

Data Export Service is an add-on service for Dynamics 365 (online) that provides the ability to replicate sales, service and marketing data to a SQL store in a customer-owned Azure subscription. It simplifies the technical and administrative complexity of deploying and managing a data export solution managing schema and data.

Navigate to the below **URL** , go to “Dynamics 365” Add-Ins and search with the name of “**Data Export Service**” as shown below

URL: <https://appsource.microsoft.com/en-us/marketplace>

The screenshot shows the Microsoft AppSource marketplace interface. At the top, there's a navigation bar with 'Microsoft', 'Cloud', 'Mobility', and 'Productivity' dropdowns. A search bar on the right contains 'Data Export Service'. Below the navigation bar, there's a 'Products' sidebar on the left with categories like 'Web Apps', 'Add-Ins', and 'Dynamics 365' (which is highlighted with a red box). The main area displays 'App results (171)' and 'View consulting services (96)'. Several app cards are shown, including 'Microsoft Dynamics 365 - Data Export Service' (highlighted with a red box), 'Microsoft Common Data Service', 'Export To Excel Tracking', and 'Big Data as a Service'. Each card has a 'Get it now' button (highlighted with a red box for the first app) and a heart icon.

The system will request the connection details like user name, organization name and other details as shown below. Enter the appropriate details and click on **Continue**.

The screenshot shows the setup screen for the 'Microsoft Dynamics 365 - Data Export Service'. The left sidebar shows the app's overview, including a 'GET IT NOW' button and a 4.5-star rating. The main area is titled 'One more thing ...' and contains a form for providing basic profile information. The form fields include 'Name', 'Work email', 'Job title', 'Company', 'Country / region', and 'Phone number'. A checkbox is checked, indicating agreement to the terms of use and privacy policy. At the bottom, there's a 'Continue' button (highlighted with a red box) and a note stating 'You're signed in as SESIT D365 Admin Account (sesd365@microsoft.com)'.

The solution is imported into the system and the same is available in the Imported list as shown below.

RIBBON WORKBENCH 2016

Search Results

Name	Display Name ↑	Version	Package T...	Publisher	Description
DataExportService	Data Export Service fo...	1.0.0.0	Managed	Microsoft Dynamics 365	Data export service provides the ability for custo...

2.3 Email Lab Alerts

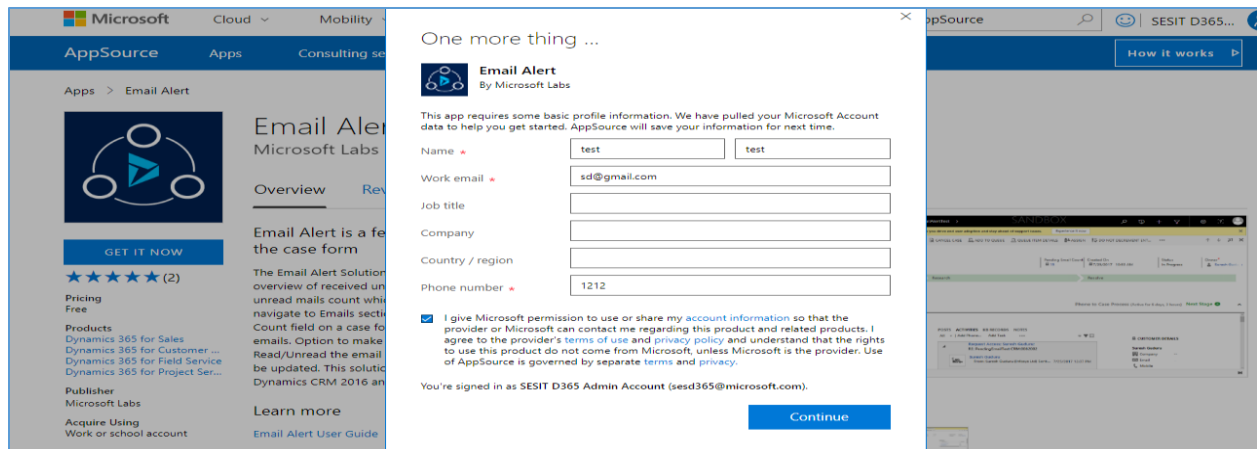
The Email Alert Solution is an add-on feature to dynamics 365 CRM which provides an overview of received and unread CRM emails on a Case. This is used in this application as it enables users to get the unread mails count which were received on a case.

Navigate to the below **URL** , go to “Dynamics 365” Add-Ins and search with the name of “**Email Alert**” as shown below

URL: <https://appsource.microsoft.com/en-us/marketplace>

The screenshot shows the Microsoft AppSource marketplace interface. The search bar at the top contains the text 'email alert'. The left sidebar shows the navigation menu with 'Dynamics 365' highlighted under the 'Add-Ins' section. The main content area displays 'App results (80)' and 'View consulting services (7)'. The first result, 'Email Alert', is highlighted with a red box. It is described as a feature to show the unread emails count on the case form and is marked as 'Free'. A 'Get it now' button is visible at the bottom of the result card. Other results like 'Alertme' and 'Reminder 365' are also visible.

The system will request the connection details like user name, organization name and other details as shown below. Enter the appropriate details and click on **Continue**.



The solution is imported into the system and the same is available in the Imported list as shown below.

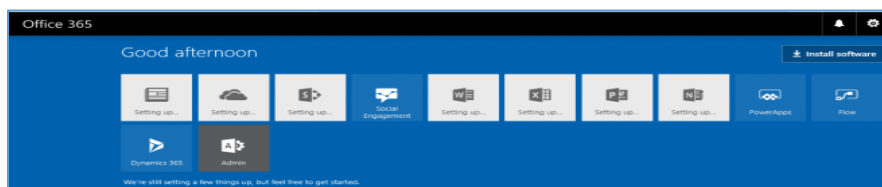
RIBBON WORKBENCH 2016						
Search Results						
MicrosoftLabsEmailAlert						
Name	Display Name	Version	Package T...	Publisher	Description	
MicrosoftLabsEmailAlert	MicrosoftLabs.EmailAL...	1.0.0.1	Managed	MicrosoftDynamics	This solution contains all the components which ...	

2.4 Voice of Customer (VOC)

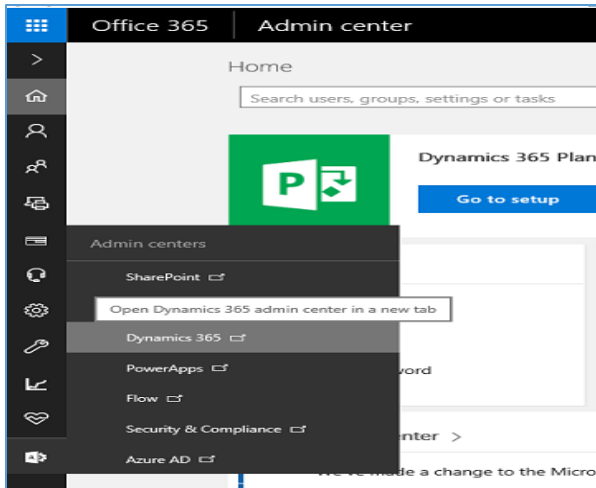
Voice of the Customer is a new Dynamics CRM 2016 feature that was created to capture feedback regarding the product or service provided by the CRM. Voice of the Customer, enables setting up of surveys, survey distribution to contacts via workflows, and capture responses. These captured data can be utilized for generating reports and making appropriate changes to the product/service.

User can take advantage of the feature by installing Voice of the Customer solution. The Solution is available globally for Microsoft Dynamics CRM Online subscriptions.

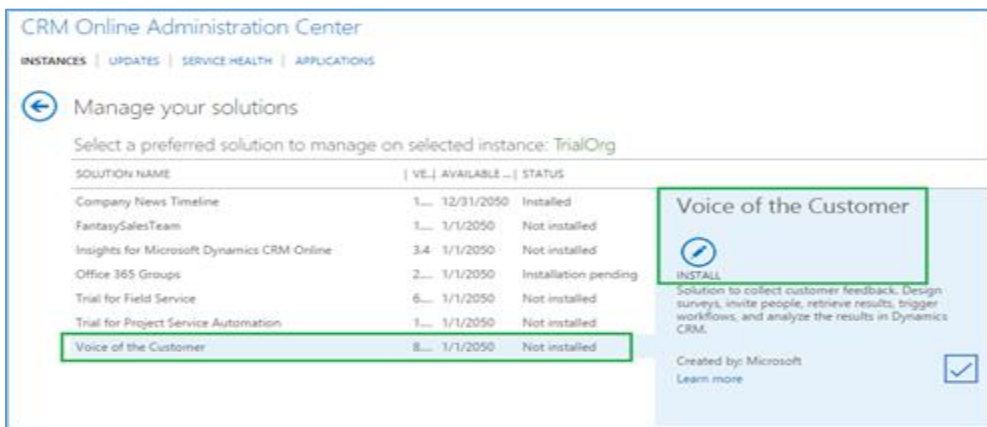
1. Access the link, <https://portal.office.com/> and click on the '**Admin**' tile. User must be logged into the Office 365 Administrator account.



2. Click on **Admin Center** and select **Dynamics 365**.



3. Select the instance (organization) for which you want to install **Voice of Customer** and click on the **Edit** button, next to Solutions.
4. Select the **Voice of the Customer** and click on **Install**.

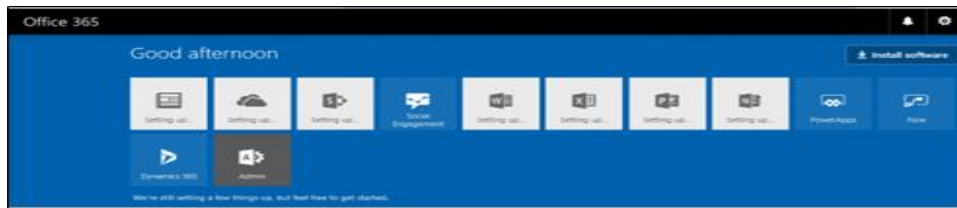


Note: When a solution is installed in CRM, the CRM Online site goes into maintenance mode and will be offline for a short period of time. It is advisable to install the solution in outside office hours.

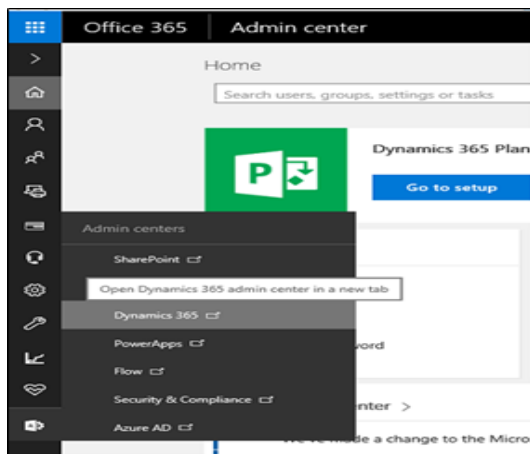
2.5 CRM Hub Installation

To enable UCI client and related features, end user need to install CRM Hub Installation.

1. Go to <https://portal.office.com/> and click on the '**Admin**' tile. User must be logged into the Office 365 Administrator account.

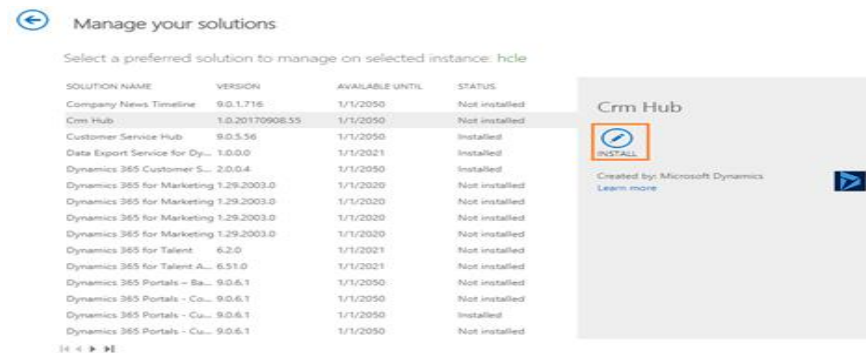


2. Click on 'Admin Center' and select 'Dynamics 365'.



3. Select the instance (organization) for which you want to install 'CRM Hub' and click on the 'Edit' button, next to Solutions.

4. Select 'Crm Hub' from the list and click on the 'Install' button.



5. Click on 'Install' button in the pop-up.

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IMPORTANT: By installing this supplement, (1) you consent to share addresses with an external system (Bing Maps) to locate addresses on a map and determine distance and travel time between locations, this supplement overrides your command on the admin System Settings to disable Bing Maps, please consult Bing Maps technical documentation for more information; and (2) you consent to allow authorized users, accessing the online service, to instruct the App to:

- a) Transmit addresses to the third party mapping service provider

Deflected by the Customer Customer mobile data

cancel

install

By clicking install/upgrade you are agreeing to the above terms of service agreement.

6. The Status changes to 'Installed'.



Manage your solutions

Select a preferred solution to manage on selected instance: hcl

SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS
Company News Timeline	9.0.1.716	1/1/2050	Not installed
Crm Hub	1.0.20170908.55	1/1/2050	Installed
Customer Service Hub	9.0.5.56	1/1/2050	Installed
Data Export Service for Dy...	1.0.0.0	1/1/2021	Installed
Dynamics 365 Customer S...	2.0.0.4	1/1/2050	Installed
Dynamics 365 for Marketing 1.29.2003.0		1/1/2020	Not installed
Dynamics 365 for Marketing 1.29.2003.0		1/1/2020	Not installed
Dynamics 365 for Marketing 1.29.2003.0		1/1/2020	Not installed
Dynamics 365 for Marketing 1.29.2003.0		1/1/2020	Not installed
Dynamics 365 for Talent	6.2.0	1/1/2021	Not installed
Dynamics 365 for Talent A...	6.5.1.0	1/1/2021	Not installed
Dynamics 365 Portals - Ba...	9.0.6.1	1/1/2050	Not installed
Dynamics 365 Portals - Co...	9.0.6.1	1/1/2050	Not installed
Dynamics 365 Portals - Cu...	9.0.6.1	1/1/2050	Installed
Dynamics 365 Portals - Cu...	9.0.6.1	1/1/2050	Not installed

11 < > X

Company News Tim...



INSTALL

You can now view news related to an Account, Lead, Contact or Opportunity in the CRM app on your mobile device. The Company news timeline solution for mobile enables sales and service users ... (more)

Created by: Microsoft
[Learn more](#)



7. Navigate to Dynamics 365 CRM Organization to verify and validate if the Managed solution for the "Crm Hub" is installed with the above steps.

All Solutions ▾

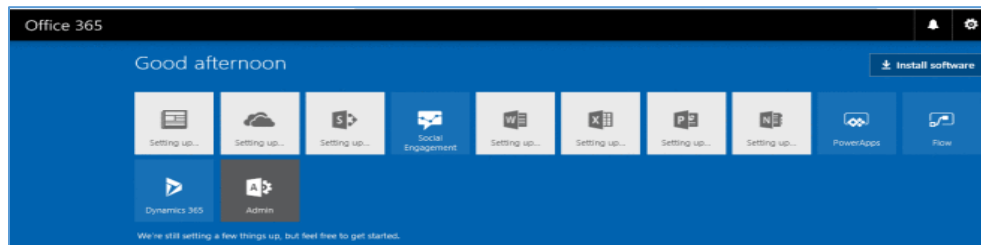
Search for records

Name	Display Name	Version	Installed On	Package T...	Publisher	Description
msdynce_CRMHub	Crm Hub	1.0.20170...	9/25/2018	Managed	Microsoft Dynamics	
MIMSAppSourceV2	IMS AppSource V2	1.0.0.0	9/25/2018	Managed	Default Publisher for MIMS	
TestSolution	TestSolution	1.0	9/14/2018	Unmanag...	Default Publisher for hdiP	
StarterPortal	Dynamics 365 Portals ...	9.0.6.1	9/13/2018	Managed	Microsoft	Portal capabilities that allow you to engage your...
BaseHtmlEditor_portal	Dynamics 365 Portals ...	1.1.1.1	9/13/2018	Managed	Microsoft Dynamics	This solution installs a html content designer in ...
PortalTimeline	Dynamics 365 Portals ...	8.4.0.3	9/13/2018	Managed	Microsoft	Portal Timeline extends Customer Service Portal ...
MicrosoftAzureStorage	Dynamics 365 Portals ...	8.3.0.0	9/13/2018	Managed	Microsoft	Includes web resource components that are use...
Feedback	Dynamics 365 Portals ...	8.3.0.1	9/13/2018	Managed	Microsoft	Extends portals by providing comments and rat...
MicrosoftWebForms	Dynamics 365 Portals ...	8.4.0.9	9/13/2018	Managed	Microsoft	Extends portals by exposing preconfigured or cu...
MicrosoftIdentityWork...	Dynamics 365 Portals ...	8.3.0.0	9/13/2018	Managed	Microsoft	Contains the workflow processes that are used b...
MicrosoftIdentitySyste...	Dynamics 365 Portals ...	8.3.0.0	9/13/2018	Managed	Microsoft	Contains the workflow processes that are used b...

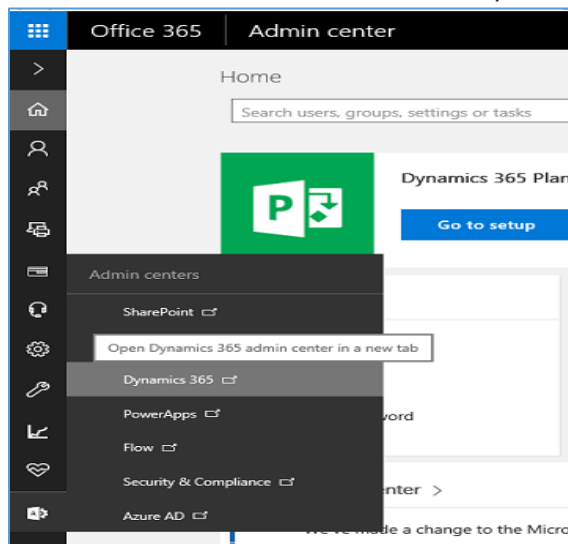
2.6 Portal Installation and Configuration

A portal is an independent running application that exposes specific CRM data and functionality to the respective users. It can be leveraged to model business processes that aren't easily modeled inside CRM or to provide a higher level of integration between your CRM and your clients. Users can range from full CRM users to external clients with minimal rights and access. Below is the step by step process to install and configure the portal:

1. Go to <https://portal.office.com/> and click on the '**Admin**' tile. User must be logged into the Office 365 Administrator account.



2. Click on 'Admin Center' and select 'Dynamics 365'.



3. Select the instance (organization) for which you want to install 'Custom Portal' and click on the 'Edit' button, next to Solutions.
4. Select 'Custom Portal' from the list and click on the 'Install' button.

Manage your solutions

Select a preferred solution to manage on selected instance: **CEWA-SMS**

SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS
Community Portal	8.2.1.71	1/1/2050	Not installed
Company News Timeline	1.0.0.0	12/31/2050	Not installed
Custom portal	8.2.1.71	1/1/2050	Not installed
Customer Self-Service Portal	8.2.1.71	1/1/2050	Not installed
Dynamics 365 Customer Service Application	1.0.0.1	1/1/2050	Installed
Dynamics 365 Sales Application	1.0.0.1	1/1/2050	Installed
Employee Self-Service Portal	8.2.1.71	1/1/2050	Not installed
FantasySalesTeam	1.4.6	1/1/2050	Not installed
Field Service	6.1.2.90	1/1/2050	Not installed
Gamification	2017.2.0	1/1/2050	Not installed
Office 365 Groups	2.7.0.0	1/1/2050	Not installed
Partner Field Service	8.2.1.71	1/1/2050	Not installed
Partner Portal	8.2.1.71	1/1/2050	Not installed
Partner Project Service	8.2.1.71	1/1/2050	Not installed
Project Service Automation	1.1.2.45	1/1/2050	Not installed

Custom portal

INSTALL

Portal capabilities that allow you to engage your customers and external audiences. Includes profile management, configurable business components, rich web content publishing, and responsive ... [\(more\)](#)

Created by: Microsoft [Learn more](#)

5. Click on 'Install' button in the pop-up.

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The license terms for the Online Service apply to your use of this supplement, except as follows:

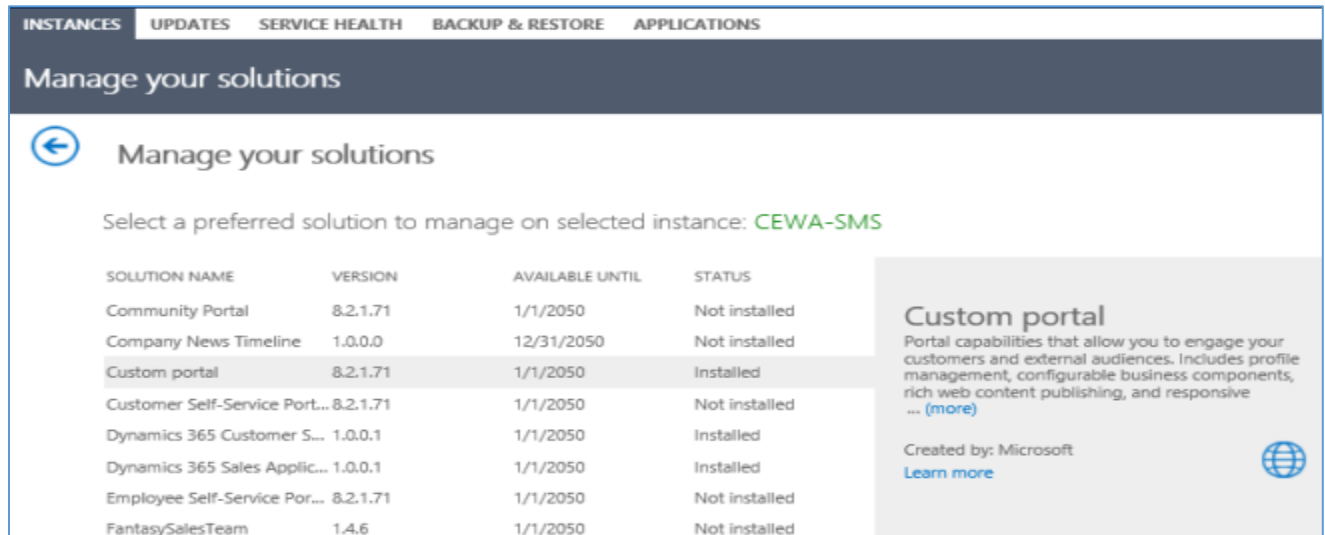
- Customer is explicitly prohibited from using the supplement to design and transmit promotional SMS messages either via the Twilio integration feature or as otherwise may be possible.

If you do not agree to these additional terms, do not install this supplement.

IMPORTANT: By installing this supplement, you consent to allow authorized users of Microsoft Dynamics 365 to configure and enable certain functionality, including but not limited to:

By clicking install/upgrade you are agreeing to the above terms of service agreement.

6. The Status changes to 'Installed'.



INSTANCES **UPDATES** **SERVICE HEALTH** **BACKUP & RESTORE** **APPLICATIONS**

Manage your solutions

Select a preferred solution to manage on selected instance: **CEWA-SMS**

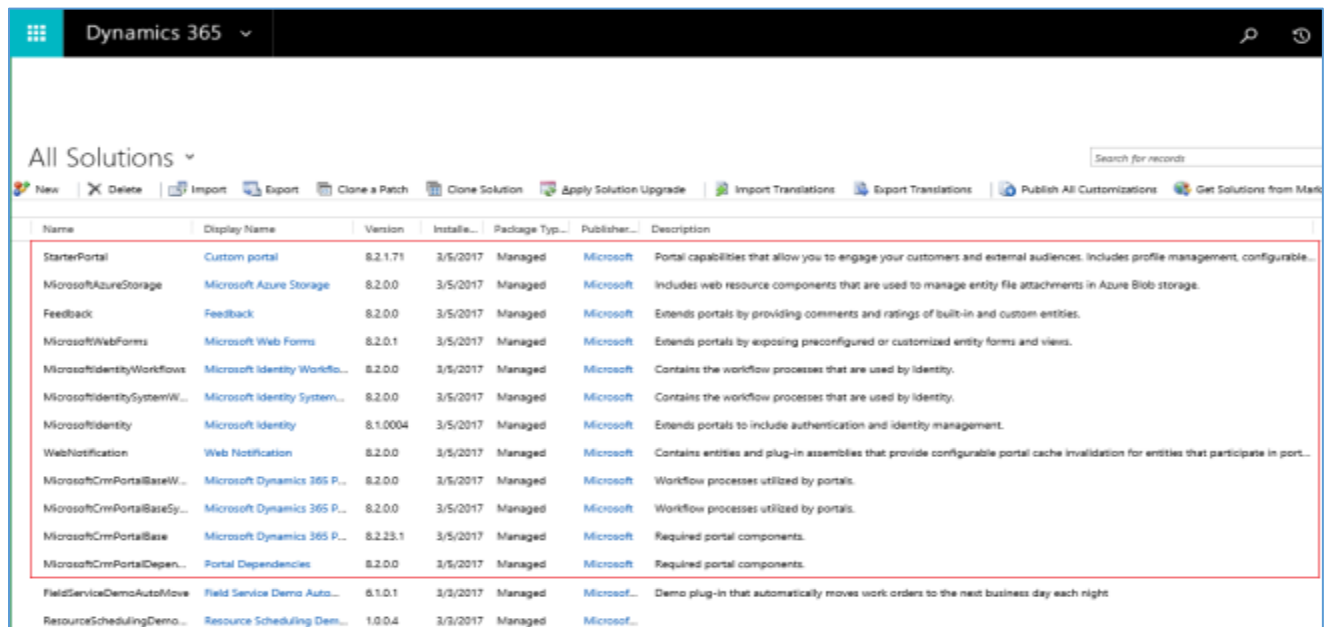
SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS
Community Portal	8.2.1.71	1/1/2050	Not installed
Company News Timeline	1.0.0.0	12/31/2050	Not installed
Custom portal	8.2.1.71	1/1/2050	Installed
Customer Self-Service Port...	8.2.1.71	1/1/2050	Not installed
Dynamics 365 Customer S...	1.0.0.1	1/1/2050	Installed
Dynamics 365 Sales Applic...	1.0.0.1	1/1/2050	Installed
Employee Self-Service Por...	8.2.1.71	1/1/2050	Not installed
FantasySalesTeam	1.4.6	1/1/2050	Not installed

Custom portal

Portal capabilities that allow you to engage your customers and external audiences. Includes profile management, configurable business components, rich web content publishing, and responsive ... [\(more\)](#)

Created by: Microsoft
[Learn more](#)

7. Navigate to Dynamics 365 CRM Organization to verify and validate all the Managed solution for the Custom portal installed with the above steps.



Dynamics 365

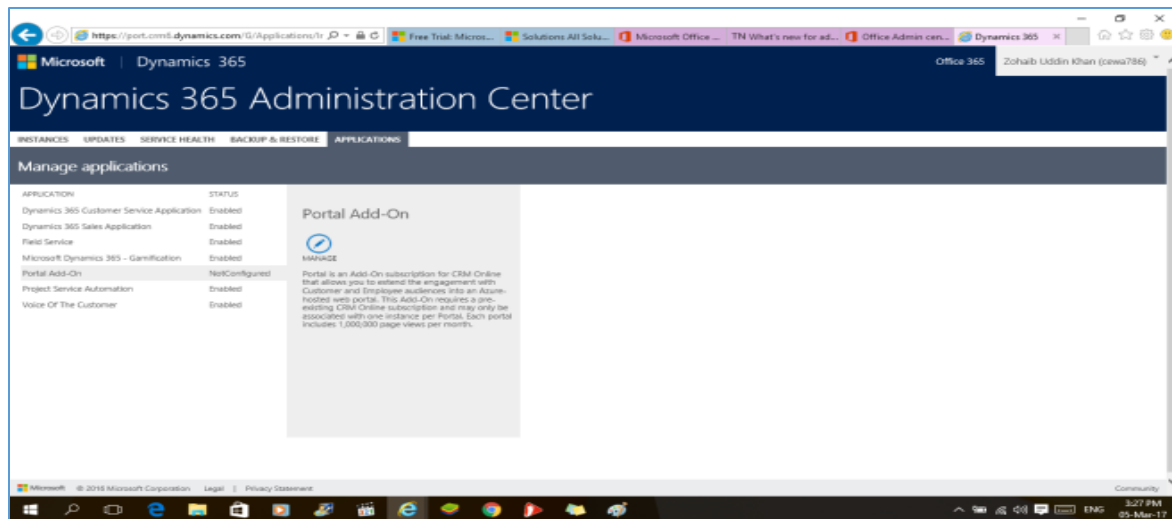
All Solutions

Search for records

New Delete Import Export Clone a Patch Clone Solution Apply Solution Upgrade Import Translations Export Translations Publish All Customizations Get Solutions from Mark

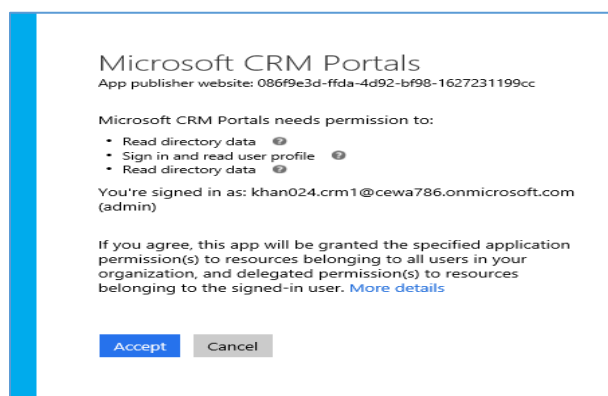
Name	Display Name	Version	Installe...	Package Typ...	Publisher...	Description
StarterPortal	Custom portal	8.2.1.71	3/5/2017	Managed	Microsoft	Portal capabilities that allow you to engage your customers and external audiences. Includes profile management, configurable...
MicrosoftAzureStorage	Microsoft Azure Storage	8.2.0.0	3/5/2017	Managed	Microsoft	Includes web resource components that are used to manage entity file attachments in Azure Blob storage.
Feedback	Feedback	8.2.0.0	3/5/2017	Managed	Microsoft	Extends portals by providing comments and ratings of built-in and custom entities.
MicrosoftWebForms	Microsoft Web Forms	8.2.0.1	3/5/2017	Managed	Microsoft	Extends portals by exposing preconfigured or customized entity forms and views.
MicrosoftIdentityWorkflows	Microsoft Identity Workflows	8.2.0.0	3/5/2017	Managed	Microsoft	Contains the workflow processes that are used by Identity.
MicrosoftIdentitySystemW...	Microsoft Identity System...	8.2.0.0	3/5/2017	Managed	Microsoft	Contains the workflow processes that are used by Identity.
MicrosoftIdentity	Microsoft Identity	8.1.0004	3/5/2017	Managed	Microsoft	Extends portals to include authentication and identity management.
WebNotification	Web Notification	8.2.0.0	3/5/2017	Managed	Microsoft	Contains entities and plug-in assemblies that provide configurable portal cache invalidation for entities that participate in port...
MicrosoftCrmPortalBaseW...	Microsoft Dynamics 365 P...	8.2.0.0	3/5/2017	Managed	Microsoft	Workflow processes utilized by portals.
MicrosoftCrmPortalBaseSy...	Microsoft Dynamics 365 P...	8.2.0.0	3/5/2017	Managed	Microsoft	Workflow processes utilized by portals.
MicrosoftCrmPortalBase	Microsoft Dynamics 365 P...	8.2.23.1	3/5/2017	Managed	Microsoft	Required portal components.
MicrosoftCrmPortalDepen...	Portal Dependencies	8.2.0.0	3/5/2017	Managed	Microsoft	Required portal components.
FieldServiceDemoAutoMove	Field Service Demo Auto...	6.1.0.1	3/3/2017	Managed	Microsoft...	Demo plug-in that automatically moves work orders to the next business day each night
ResourceSchedulingDemo...	Resource Scheduling Dem...	1.0.0.4	3/3/2017	Managed	Microsoft...	

8. Access the website <https://portal.office.com>, select 'Admin Center' and 'Dynamics 365' and click on 'Application' tab.

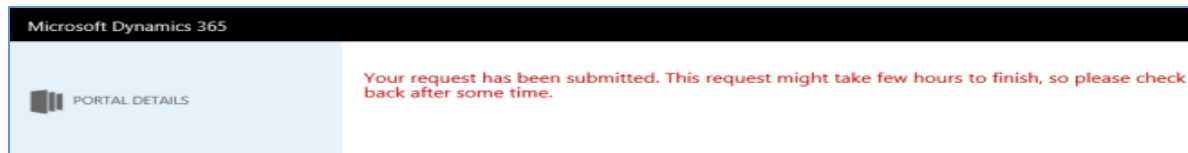


9. On the 'Configure your Portal', enter the necessary information. Enter the below details:
 - a. Name, URL for the portal
 - b. **Portal Audience:** Customer
 - c. **Portal Binding:** Custom

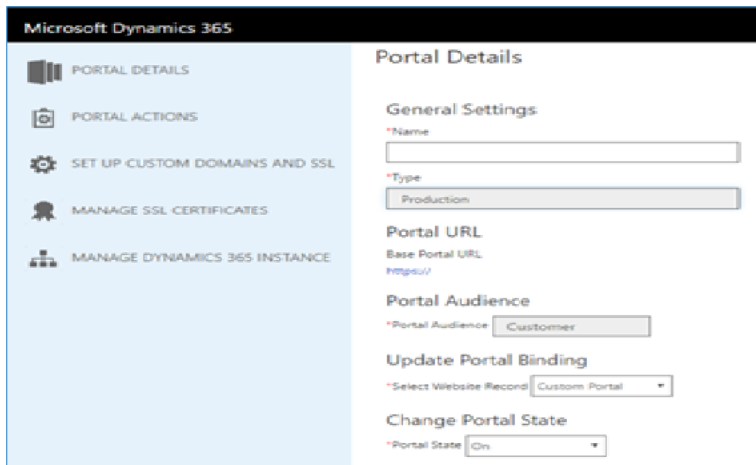
10. Click on 'Accept' in the Permissions pop up for Dynamics 365 Portal.



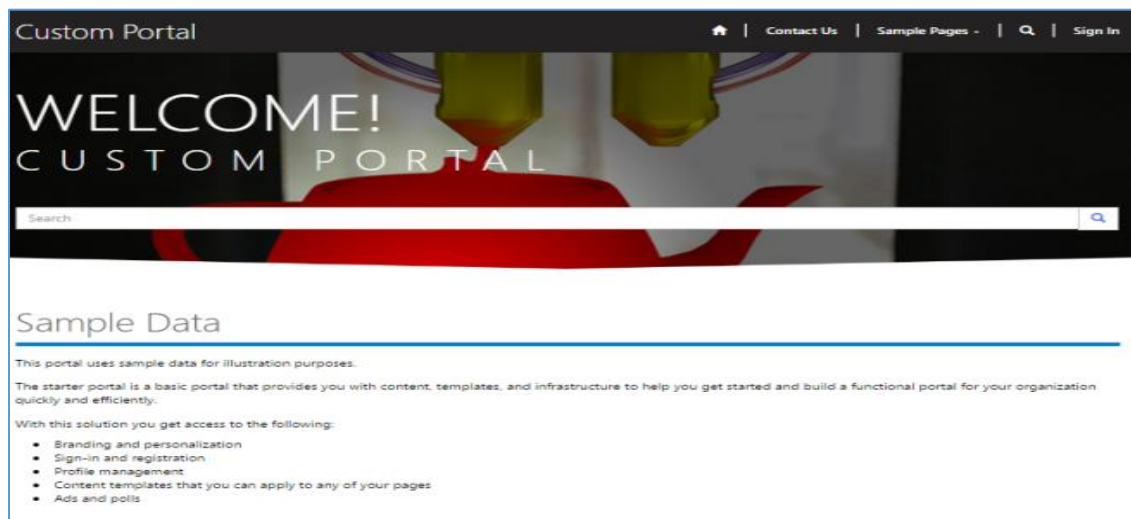
11. Navigate to 'Portal Details'. As appearing in the below message, it might take time to configure the portal, check back in some time and the 'Custom Portal' will be ready for use.



12. Once the portal set up is complete the page will display the below set of options.

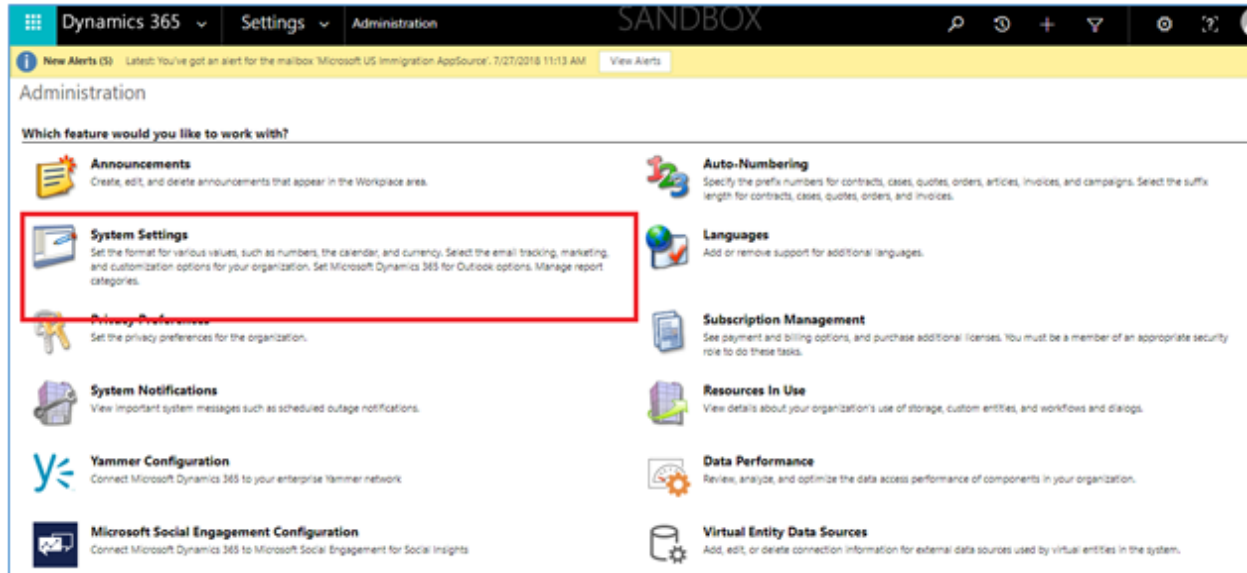


13. Click on the 'Base Portal URL', a new window will open and the Dynamics 365 Custom Portal is ready for Branding.

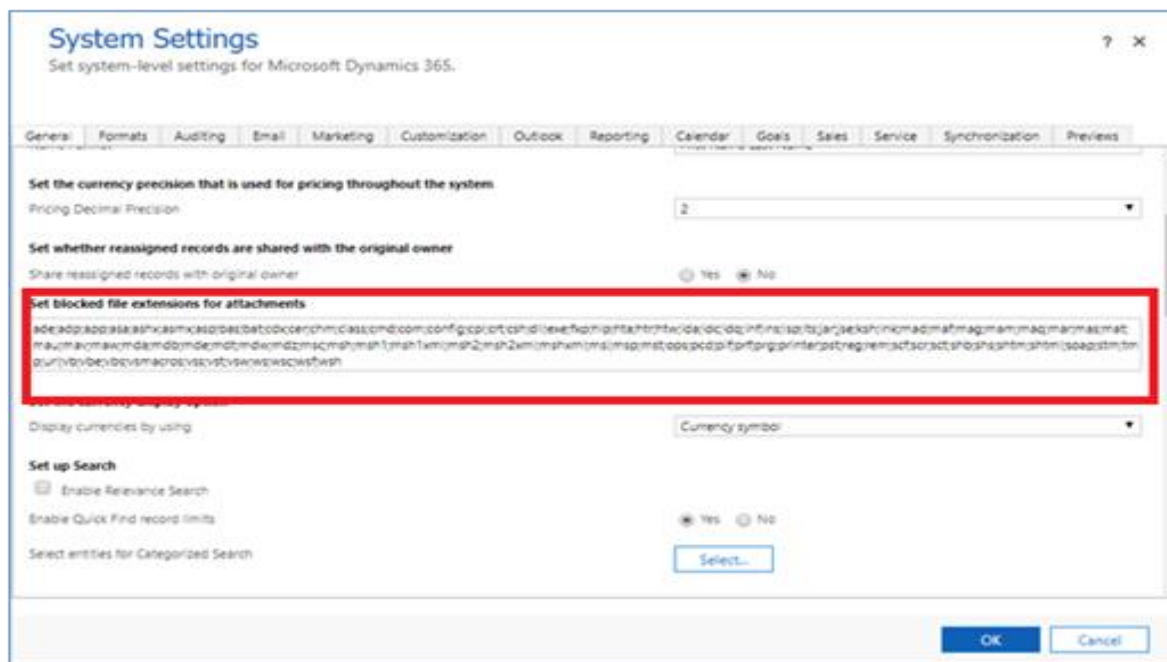


2.7 System Settings

As a part of deployment process, the following changes are required in the general tab of system setting. To access system settings, navigate to Setting -> Administration -> System Settings:



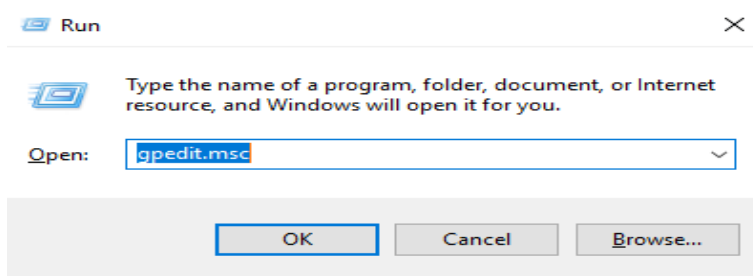
Navigate to general tab -> Set blocked extensions for attachments. Remove JS from the extensions.



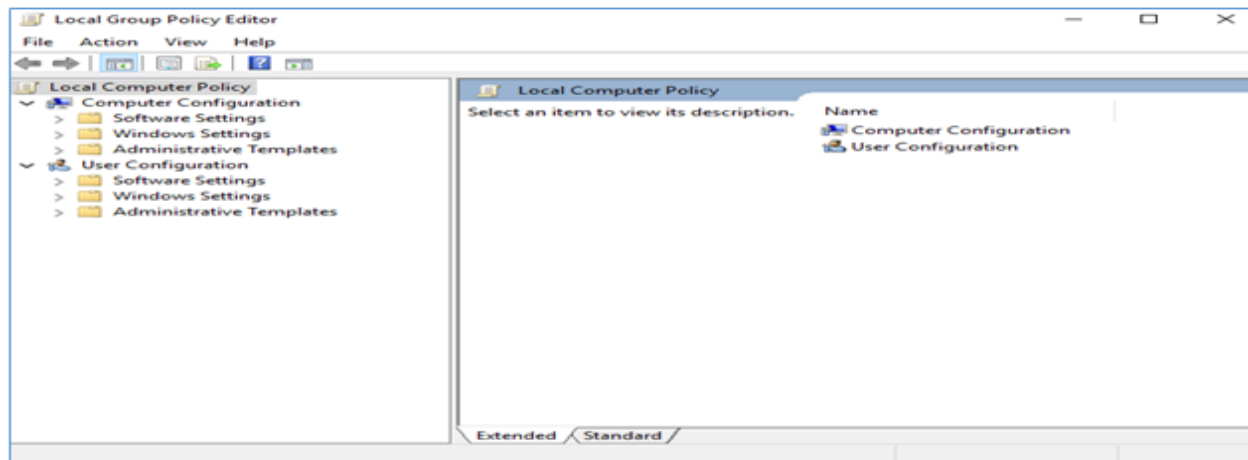
2.8 Group Policy Set up

Below settings are required to run the script and power shell commands for setting up IMS Apps from Package deployer

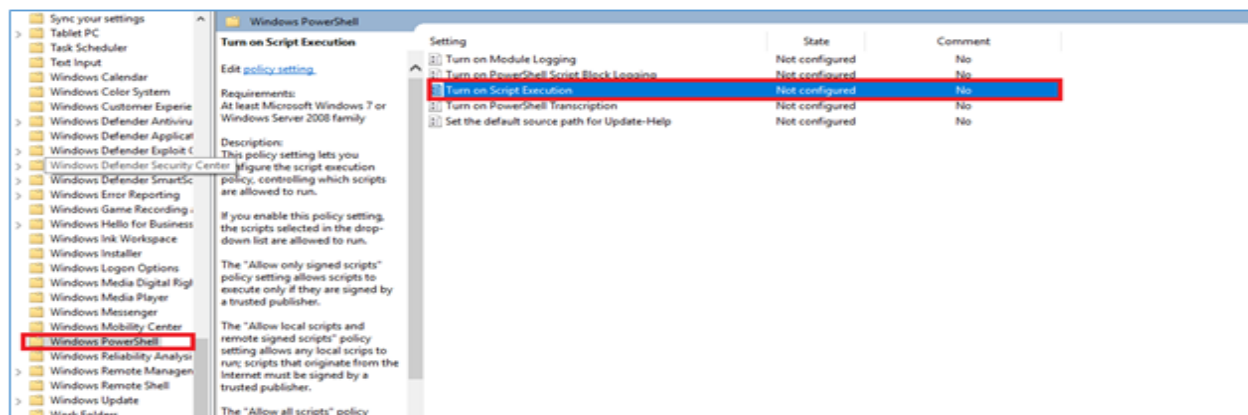
- Execute the “**gpedit.msc**” in windows run and open the Group Policy Settings as shown in the below screenshot.



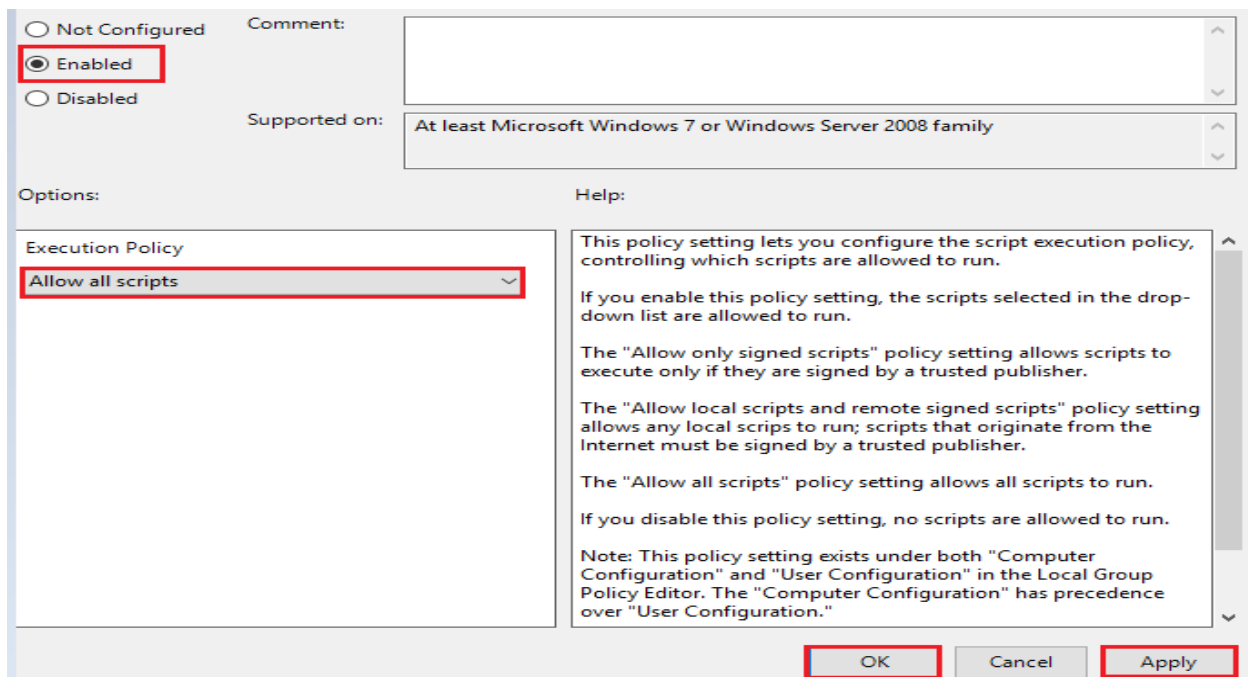
- Click on Ok



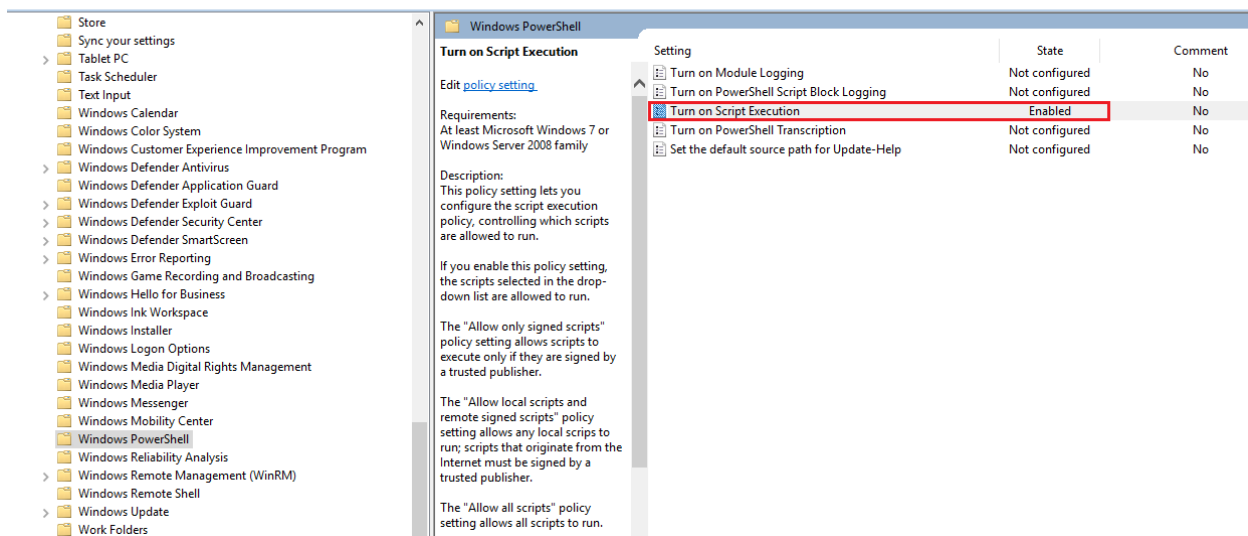
- Navigate to Computer Configuration -> Administrative Templates -> Windows Components -> Windows PowerShell as shown below



- Open “Turn on Script Execution” and change the settings as shown below

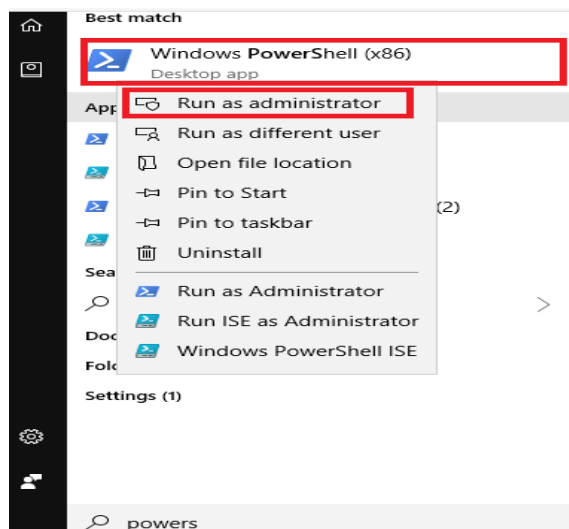


- Now the script execution state changes from Not configured to Enabled as shown below



2.9 Windows PowerShell

- Open PowerShell window from windows as shown below

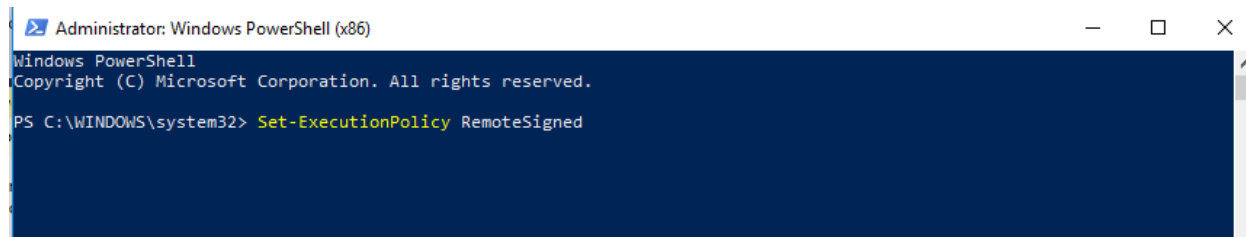


- It opens the below PowerShell window

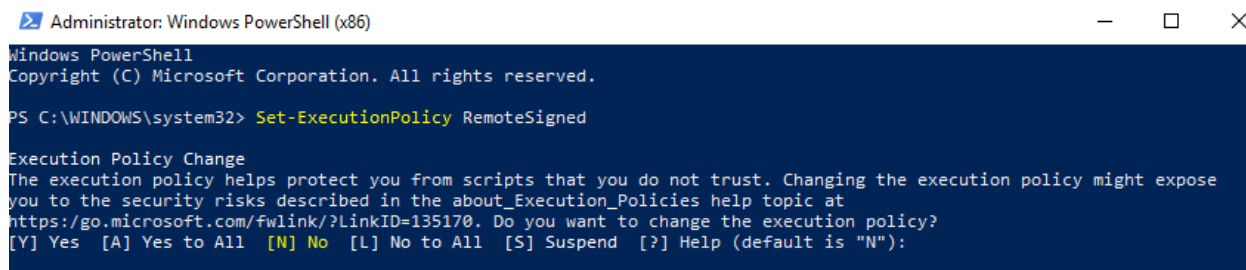


- Run the below Commands

“Set-ExecutionPolicy RemoteSigned” as shown below



- The following question appears on screen, “Do you want to change the execution policy” type “Y” and click enter



- Run the command “Install-Module AzureRM” as shown below

```
Windows PowerShell
Copyright (C) Microsoft Corporation. All rights reserved.

PS C:\WINDOWS\system32> Install-Module AzureRM

NuGet provider is required to continue
PowerShellGet requires NuGet provider version '2.8.5.201' or newer to interact with NuGet-based repositories. The NuGet provider must be available in 'C:\Program Files
(x86)\PackageManagement\ProviderAssemblies' or 'C:\Users\v-bhpelu\AppData\Local\PackageManagement\ProviderAssemblies'. You can also install the NuGet provider by running
'Install-PackageProvider -Name NuGet -MinimumVersion 2.8.5.201 -Force'. Do you want PowerShellGet to install and import the NuGet provider now?
[Y] Yes [N] No [S] Suspend [?] Help (default is "Y"):
```

- Type “Y” and click enter
- Run the command “Import-Module AzureRM” as shown below

```
Administrator: Windows PowerShell (x86)

Windows PowerShell
Copyright (C) Microsoft Corporation. All rights reserved.

PS C:\WINDOWS\system32> Import-Module AzureRM
```

- Wait to execute the import module azureRM until shows the next line as shown below

```
Administrator: Windows PowerShell (x86)

Windows PowerShell
Copyright (C) Microsoft Corporation. All rights reserved.

PS C:\WINDOWS\system32> Import-Module AzureRM
PS C:\WINDOWS\system32>
```

2.10 Azure Setup

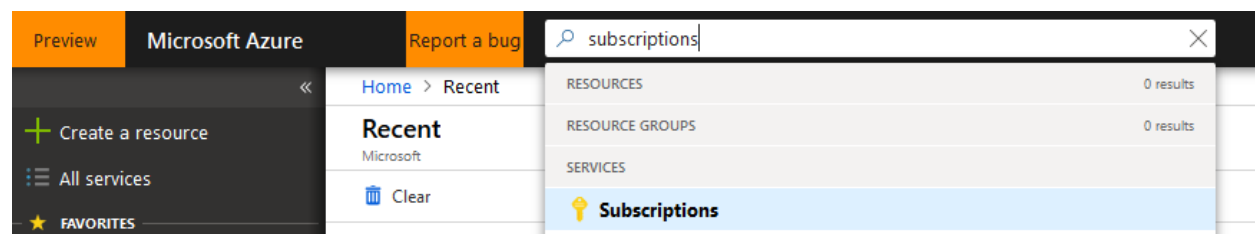
Use the below link to get more information about the azure subscription

<https://azure.microsoft.com/en-in/features/azure-portal/>

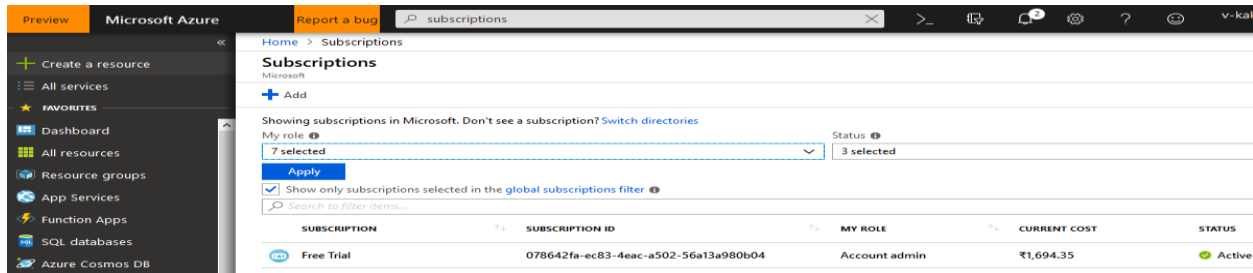
- Login to azure portal using <https://portal.azure.com>
- Sign-In to portal using service admin/co-admin role

How to get the Subscription Id ?

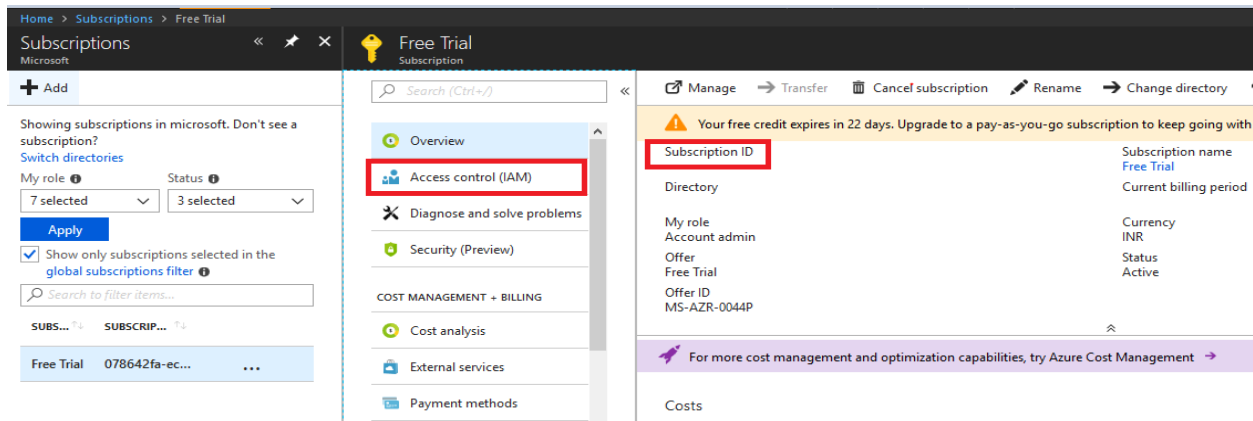
- Search for Subscriptions like showing below .



- Select the required subscription from the list below

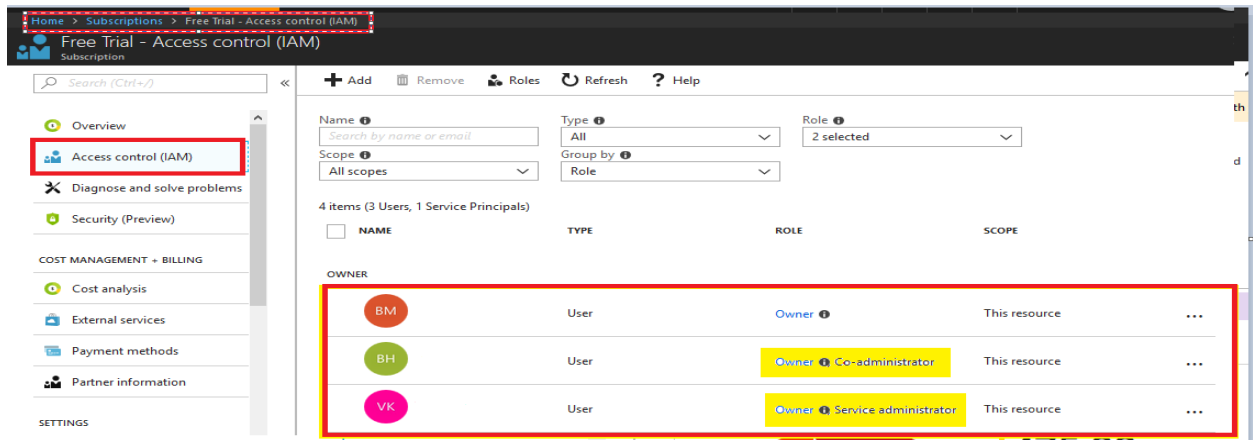


- On click of the subscription we can find the subscription id



How to find Login User role/Powershell script executing user role ?

- Click on Subscription name and select AccessControl(IAM) from left navigation links



- Find the user and his roles like above (powershell script executing user has to be under co-admin/service admin role)

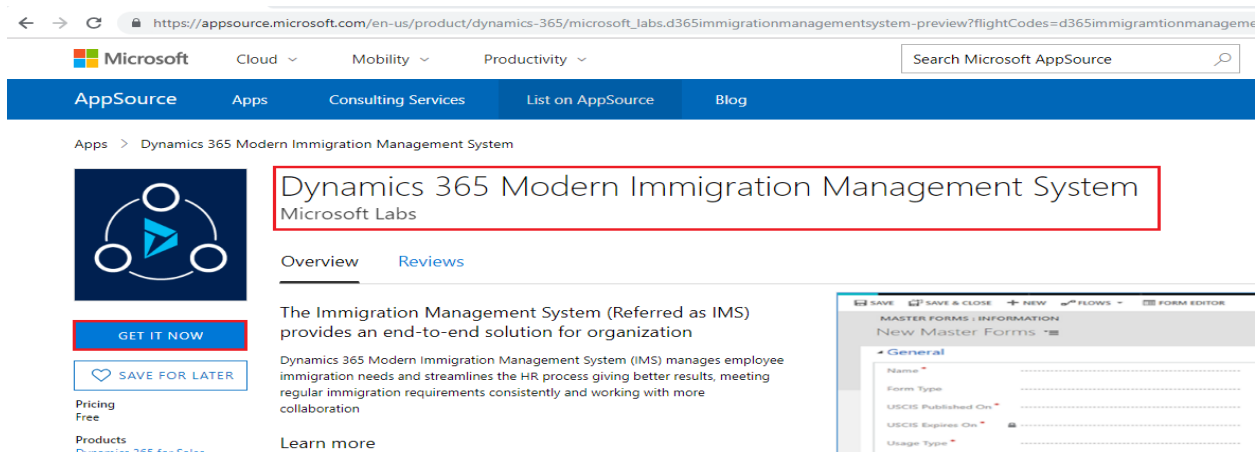
How To find the Resource Group ?

- Click on Subscription name and select ResourceGroups from left navigation links

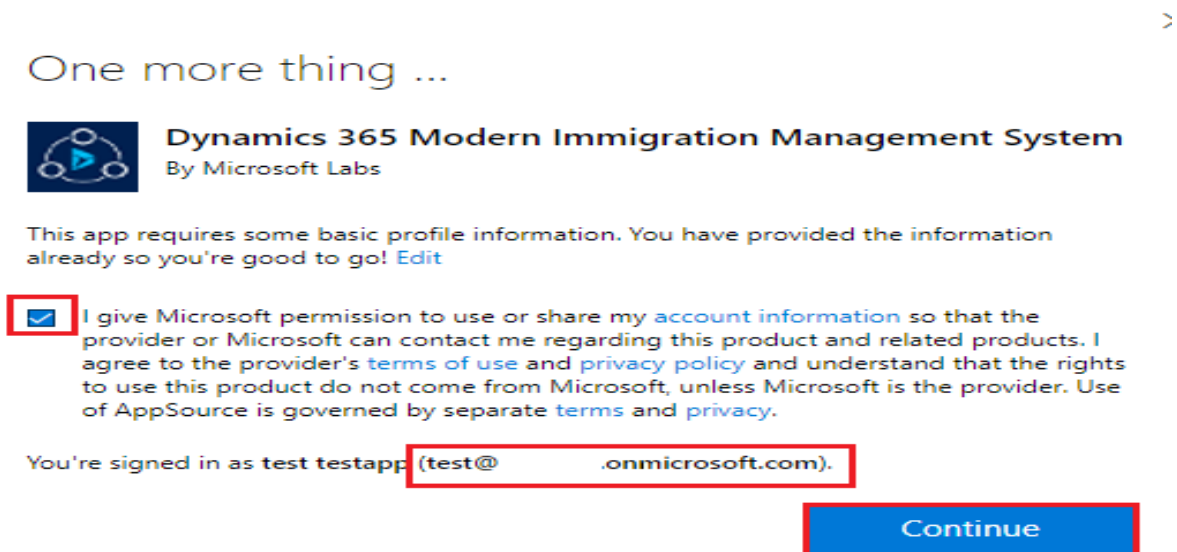
3. Install IMS App Package

Alert: This solution import may impact any of the existing CRM functionalities already there in the system. It is advised to do this on New/Vanilla instance of CRM.

- Go through the below link and click on “GET IT NOW” as shown below
https://appsource.microsoft.com/en-us/product/dynamics365/microsoft_labs.d365immigrationmanagementsystem-preview?flightCodes=d365immigramtionmanagementsystem



- On Click on “GET IT NOW” shows below image



- Select the check box to agree the Microsoft terms and privacy policy , Also validate the organization username on which crm you are going to install the IMS App and Click on Continue will install the IMS App in your CRM as shown below.

Dynamics 365 Settings Solutions							
A New version of Organization Insights dashboard is available. See how it can help you drive end user adoption and stay ahead of support issues. Experience it now							
All Solutions							
Search for records							
Name	Display Name	Version	Installed On	Package T...	Publisher	Description	
IMSAppSource	IMSAppSource	1.0.0.0	10/15/2018	Managed	Default Publisher for IMS		
<input type="checkbox"/> VoiceOfTheCustomer	Voice of the Customer...	9.0.1162.11	10/15/2018	Managed	Microsoft Dynamics 365	With Voice of the Customer for Microsoft Dyna...	
StarterPortal	Dynamics 365 Portals ...	9.0.6.1	10/14/2018	Managed	Microsoft	Portal capabilities that allow you to engage your...	
BaseHtmlEditor_portal	Dynamics 365 Portals ...	1.1.1.1	10/14/2018	Managed	Microsoft Dynamics 365	This solution installs a html content designer in ...	
PortalTimeline	Dynamics 365 Portals ...	8.4.0.3	10/14/2018	Managed	Microsoft	Portal Timeline extends Customer Service Portal ...	
MicrosoftAzureStorage	Dynamics 365 Portals ...	8.3.0.0	10/14/2018	Managed	Microsoft	Includes web resource components that are use...	
Feedback	Dynamics 365 Portals ...	8.3.0.1	10/14/2018	Managed	Microsoft	Extends portals by providing comments and rati...	
MicrosoftWebForms	Dynamics 365 Portals ...	8.4.0.9	10/14/2018	Managed	Microsoft	Extends portals by exposing preconfigured or cu...	

- Solution import will take time from 60 – 90 minutes. Check if the below two solutions are installed:
 - IMSAPPSOURCE
 - IMSFORMSSOLUTION
- If only IMSAPPSOURCE solution is installed, Re-install the IMS App Package from the AppSource from the same link mentioned above.
- Once both the solutions are imported and available in solutions, Run the data executable available in GITHUB. Only New customers who are installing the IMS application for the first time need to run this data executable. **Customers who are upgrading the solution, should not run this.**

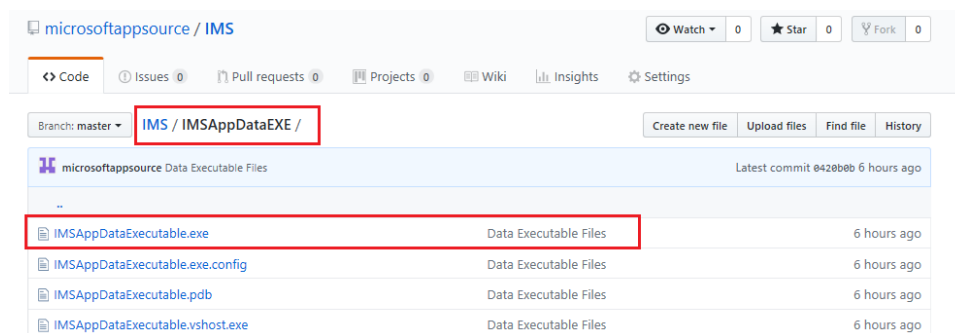
Note: If existing customers, who already have installed the data run this data executable application, all the data will be Reset.

Below are the entities for which data will be installed.

1. Queue
2. Business Process Flows
3. Business Process Flow Stages
4. Web Form
5. Web Form Step
6. Case Type
7. Questionnaire Configuration
8. Country
9. Email Template Staging
10. Master Forms
11. Master Case Configuration
12. Configuration Steps for Questionnaire
13. Business Unit
14. Category
15. Master Documents
16. Master Letters
17. Master Steps
18. Case Steps Config

19. Case Tabs Config
20. Configuration
21. Integrations Config
22. Master Attorney Configuration
23. US Embassy
24. Task Categories
25. Tags
26. Entity Form
27. Entity List
28. Web Template
29. Page Template
30. Web Page
31. Web File
32. Note
33. Site Marker
34. Site Setting
35. Content Snippet
36. Web Role
37. Entity Permission
38. Web Form Metadata
39. Entity Form Metadata
40. Team
41. Documents Config
42. Stage Queue Mapping

1. In case of any issues with above #1, run the executable provided in the GitHub (<https://github.com/microsoftappsourc/IMS/tree/master/IMSAppDataEXE>), which will re-do the data import upsert operation.



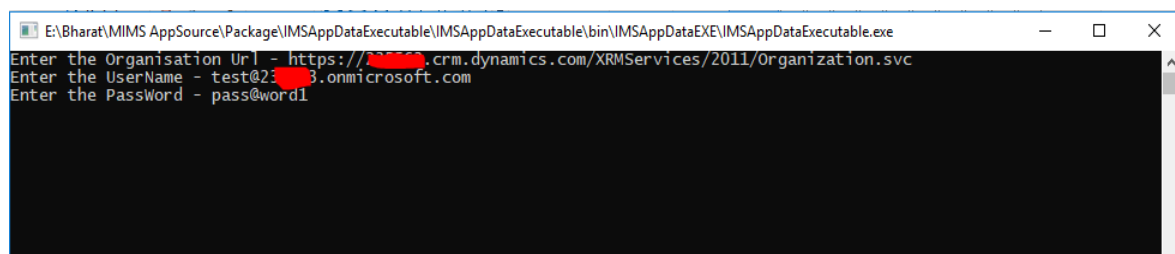
Navigate to Downloaded "IMS-master" Folder -> IMSAppDataExe

View

C > Downloads > IMS-master > IMS-master > IMSAppDataEXE

Name	File ownership	Date modified	Type	Size
IMSAppDataExecutable		15-10-2018 00:49	Application	22 KB
IMSAppDataExecutable.exe		15-10-2018 00:49	XML Configuratio...	1 KB
IMSAppDataExecutable.pdb		15-10-2018 00:49	Program Debug D...	28 KB
IMSAppDataExecutable.vshost		15-10-2018 00:49	Application	23 KB
IMSAppDataExecutable.vshost.exe		15-10-2018 00:49	XML Configuratio...	1 KB
MasterData		15-10-2018 00:49	XML File	14,158 KB
MasterDataUpdate		15-10-2018 00:49	File	46 KB
Microsoft.Azure.KeyVault.Core.dll		15-10-2018 00:49	Application extens	14 KB
Microsoft.Azure.KeyVault.Core		15-10-2018 00:49	XML File	7 KB
Microsoft.Crm.Sdk.Proxy.dll		15-10-2018 00:49	Application extens	274 KB
Microsoft.IdentityModel.Clients.ActiveDi...		15-10-2018 00:49	Application extens	187 KB
Microsoft.IdentityModel.Clients.ActiveDi...		15-10-2018 00:49	Application extens	50 KB
Microsoft.Xrm.Sdk.Deployment.dll		15-10-2018 00:49	Application extens	91 KB
Microsoft.Xrm.Sdk.dll		15-10-2018 00:49	Application extens	519 KB
Microsoft.Xrm.Tooling.Connector.dll		15-10-2018 00:49	Application extens	211 KB

- Open the “IMSAppAzurePackage” Application shown in above image will run the application as shown below



- Enter the Organization Service URL, UserName and PassWord of CRM

Organization URL

Navigate to CRM -> Settings -> Customizations ->Developer Resources

Dynamics 365 ▾ **Settings** ▾ Customizations

Apps for Dynamics 365 View Dynamics 365 information on the go with apps for your phone, tablet, Outlook, and more! [Get Apps for Dynamics 365](#)

Developer Resources

Setting Started

[Developer Center](#) [Developer Forums](#) [SDK NuGet Packages](#)

[SDK Download](#) [Sample Code](#) [Developer Overview](#)

Connect your apps to this instance of Dynamics 365

Instance Web API
 HTTP REST API providing access to this instance of Dynamics 365. For more information see [Microsoft Dynamics 365 Web API](#).

Service Root URL

[Download OData Metadata](#)

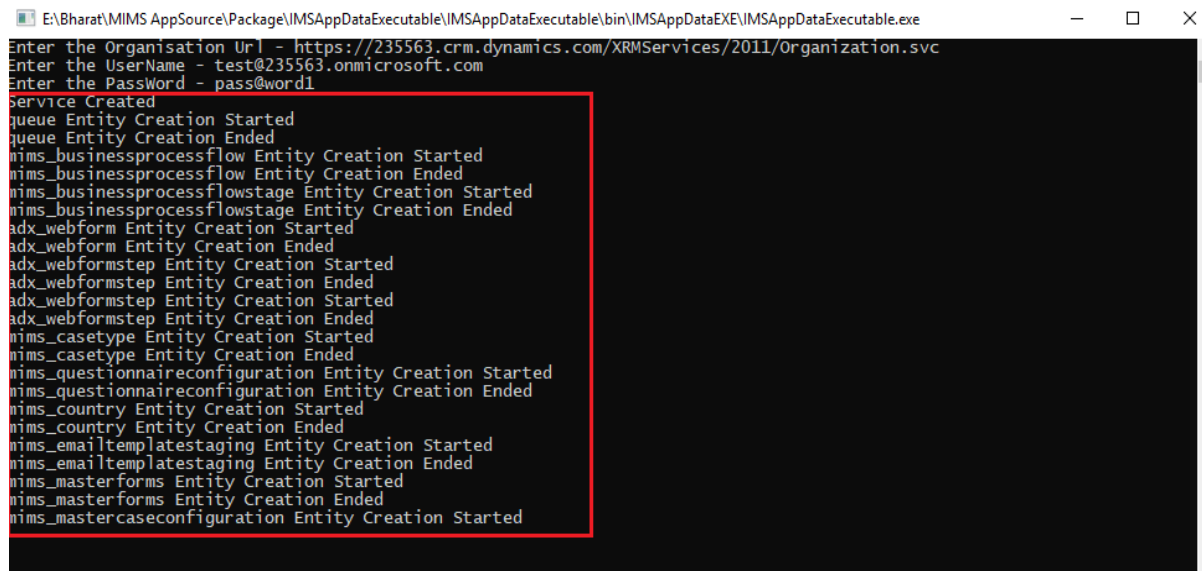
Instance Reference Information
 Use this information to uniquely identify this instance of Dynamics 365. You can use this to retrieve the

Organization Service
 SOAP Service providing access to this instance of Dynamics 365. For more information see [Use the IOrganizationService web service to read and write data or metadata](#).

Endpoint Address

[Download WSDL](#)

Creating the records In CRM as shown below and closes the application once the records are created in CRM



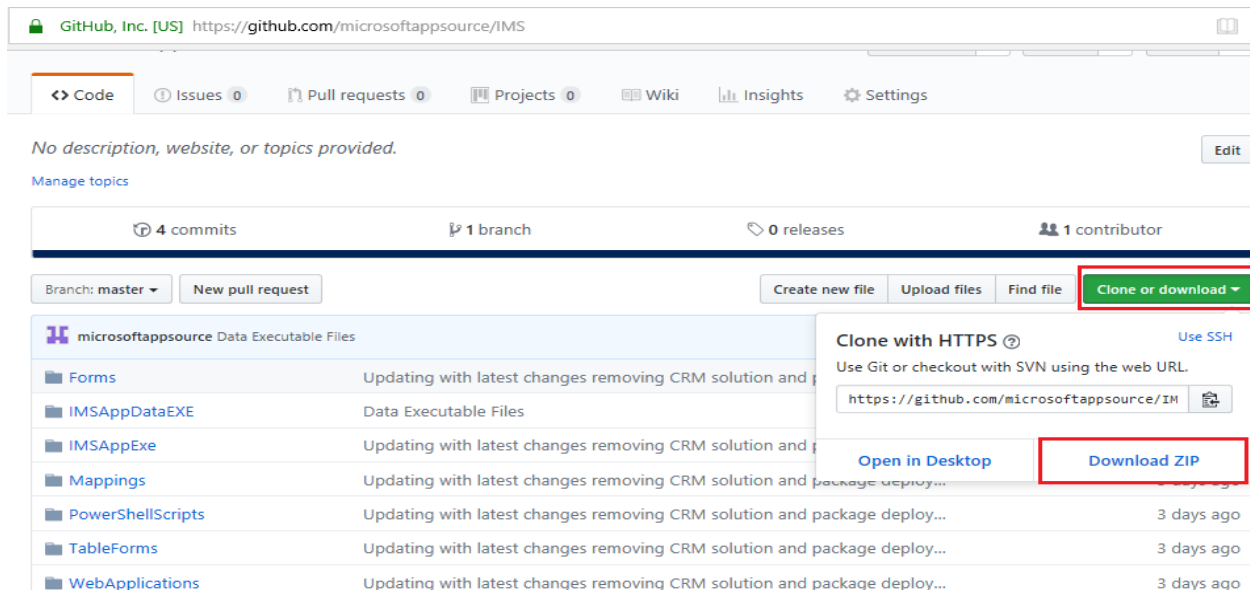
```
E:\Bharat\MIMS AppSource\Package\IMSAppDataExecutable\IMSAppDataExecutable\bin\IMSAppDataEXE\IMSAppDataExecutable.exe
Enter the Organisation Url - https://235563.crm.dynamics.com/XRMServices/2011/Organization.svc
Enter the UserName - test@235563.onmicrosoft.com
Enter the Password - pass@word1
Service Created
queue Entity Creation Started
queue Entity Creation Ended
nims_businessprocessflow Entity Creation Started
nims_businessprocessflow Entity Creation Ended
nims_businessprocessflowstage Entity Creation Started
nims_businessprocessflowstage Entity Creation Ended
adx_webform Entity Creation Started
adx_webform Entity Creation Ended
adx_webformstep Entity Creation Started
adx_webformstep Entity Creation Ended
adx_webformstep Entity Creation Started
adx_webformstep Entity Creation Ended
nims_casetype Entity Creation Started
nims_casetype Entity Creation Ended
nims_questionnaireconfiguration Entity Creation Started
nims_questionnaireconfiguration Entity Creation Ended
nims_country Entity Creation Started
nims_country Entity Creation Ended
nims_emailtemplatestaging Entity Creation Started
nims_emailtemplatestaging Entity Creation Ended
nims_masterforms Entity Creation Started
nims_masterforms Entity Creation Ended
nims_mastercaseconfiguration Entity Creation Started
```

4. Download IMS App Azure Components

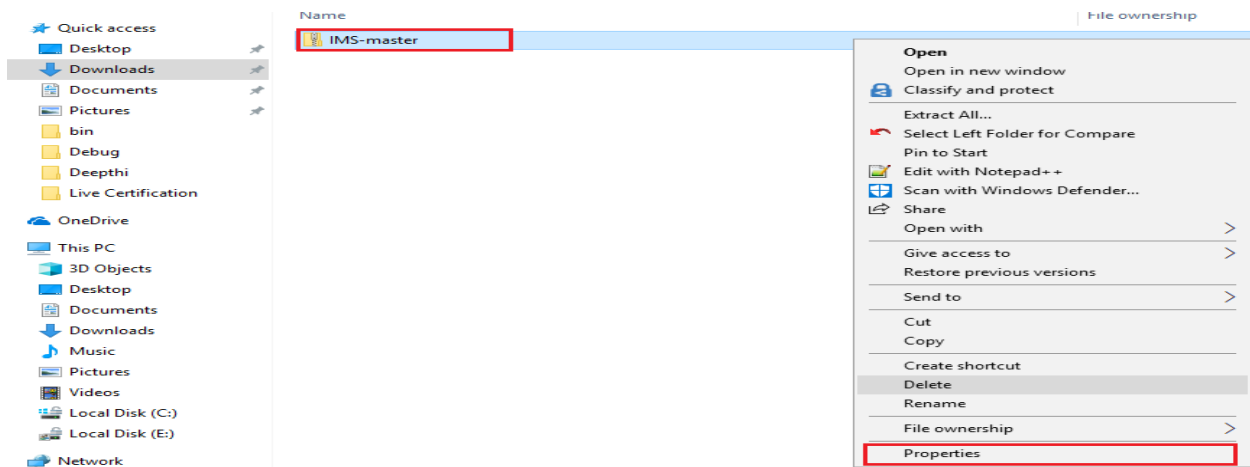
- Go through the below link

<https://github.com/microsoftappsourc/IMS>

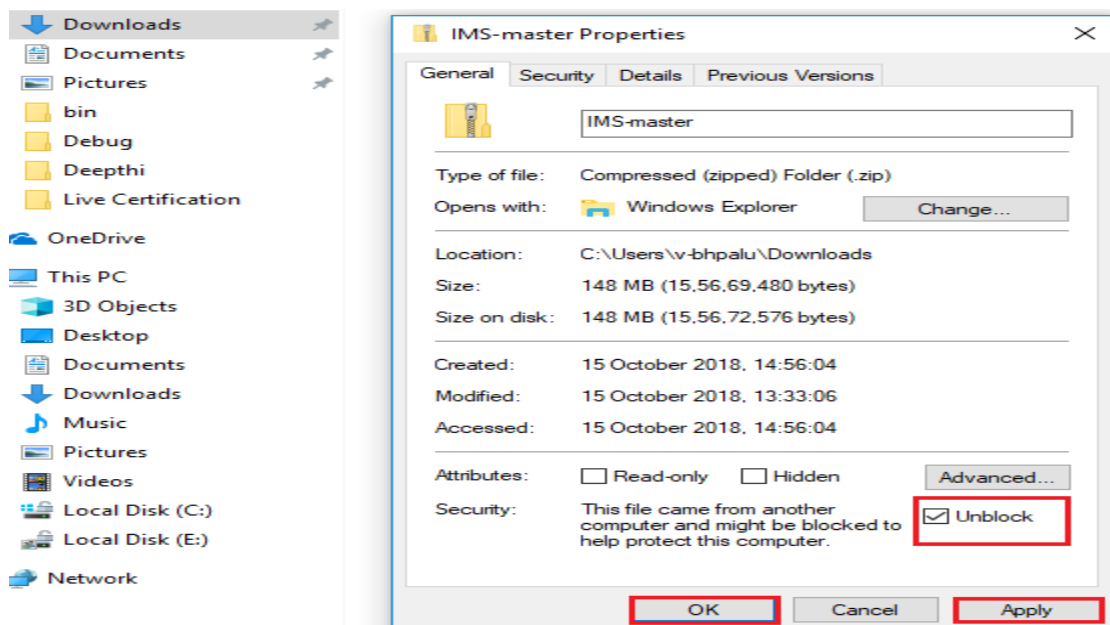
- Download the components as shown below



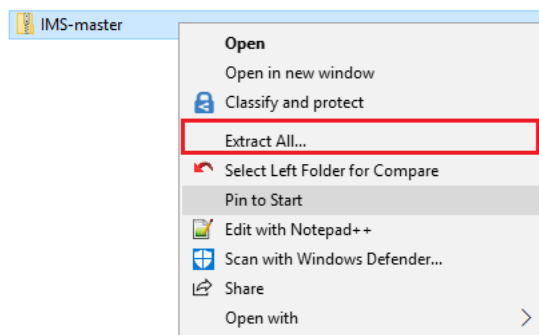
- Unblock the zip file which you downloaded from github as shown below
- Navigate to Zip File -> Properties



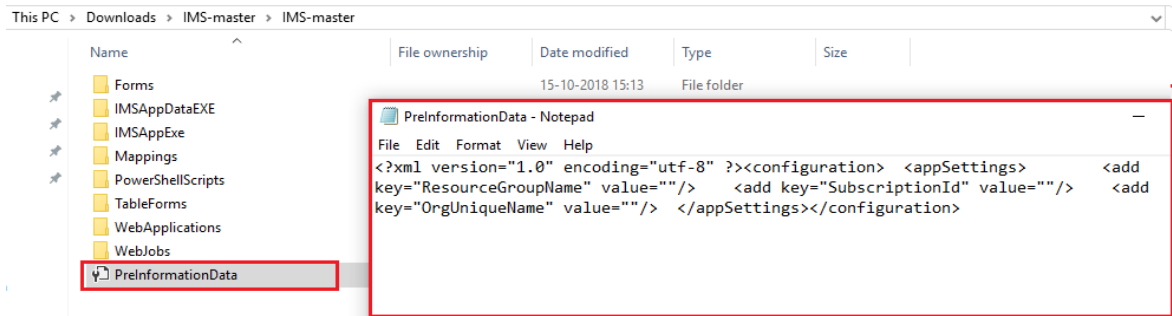
- Click on Properties and check the unblock checkbox and click on “Ok” as shown below



- Extract the folder which contains all the IMS App Components



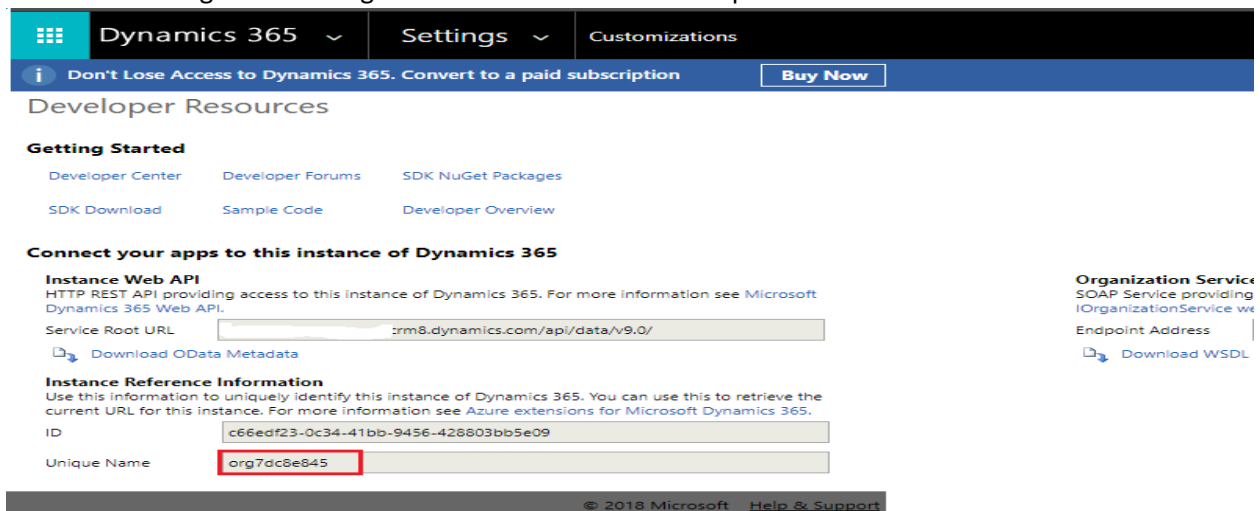
- Open the “IMS-master” Folder and find the “PreInformationData.xml” File and Open as shown below.



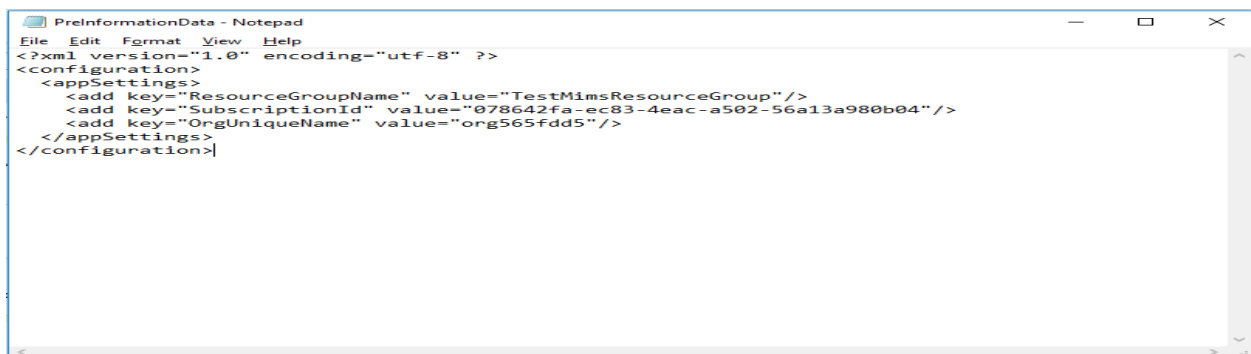
Enter the ResourceGroup , SubscriptionId and Organization UniqueName as shown below

How to get Organisation Unique Name ?

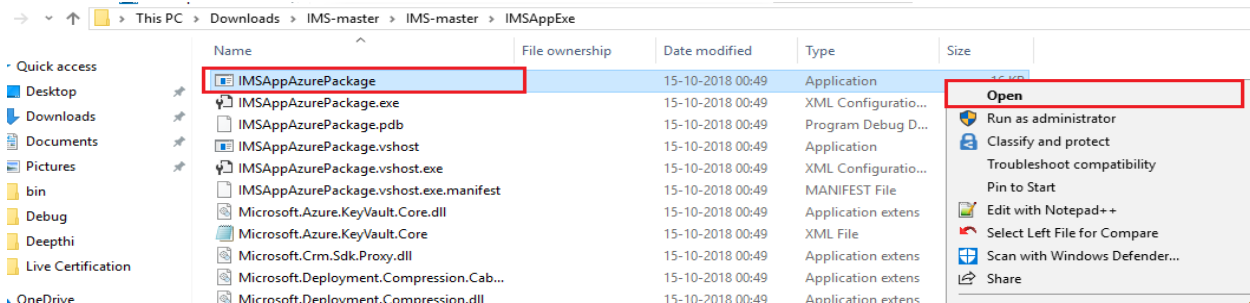
- In CRM Navigate to Settings - > Customizations -> Developer resources as shown below:



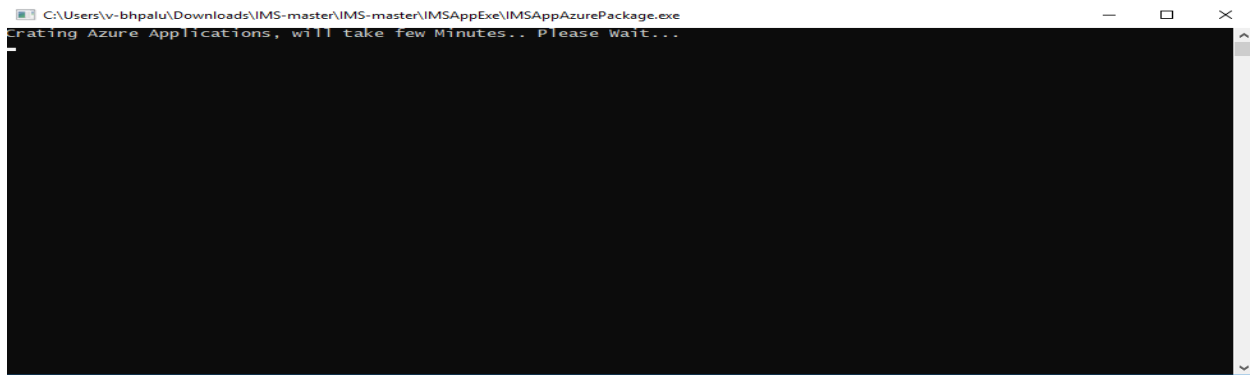
- Resource Group Name and Subscription Id are mentioned in 2.10 Azure Setup
- Mention the “ResourceGroupName” , “SubscriptionId” and Organisation uniqueName as shown below image



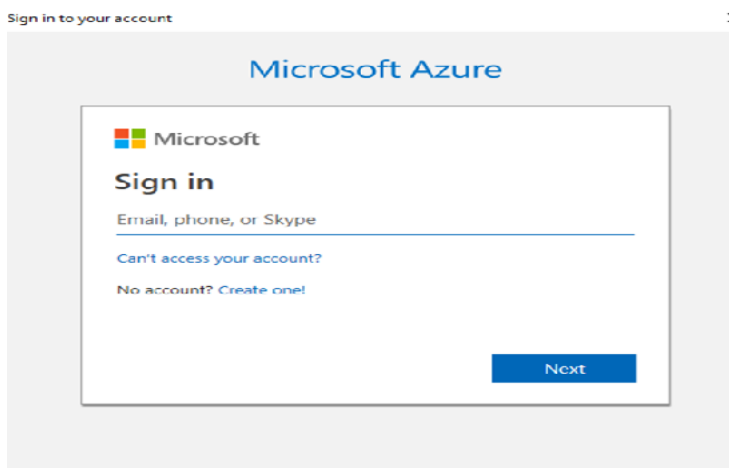
- Update the above file with Resource Group,SubscriptionId ,Organization Name values save and close the file.
- Open the folder “IMS-master” and Open the folder “IMSAppExe” and Run the “IMSAppAzurePackage” as shown below



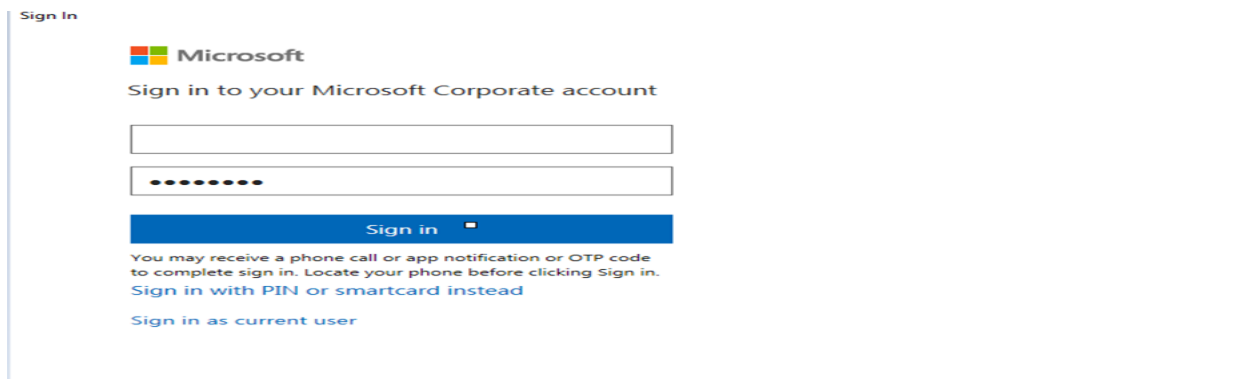
- Open the IMSAppAzurePackage Application will shows the command prompt as shown below



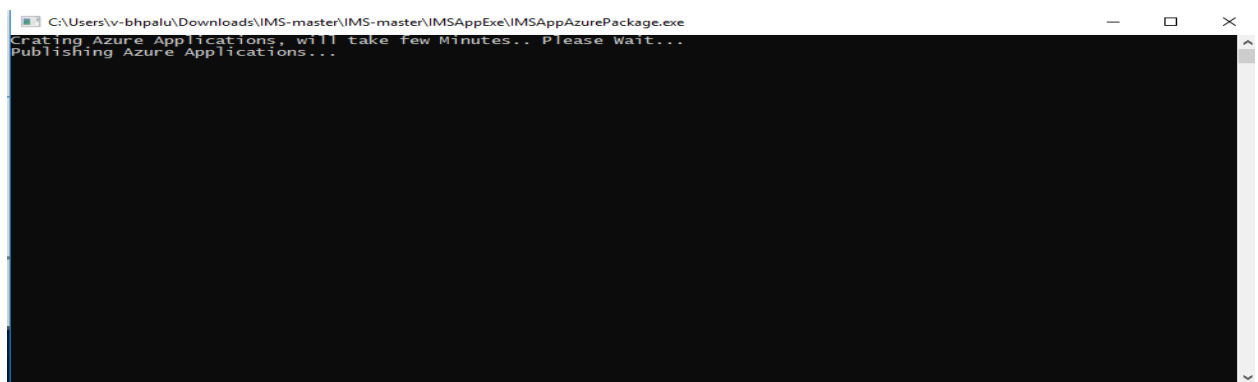
- And prompt you an azure login window as shown below
- Login to azure using service admin/co-admin role to deploy web applications



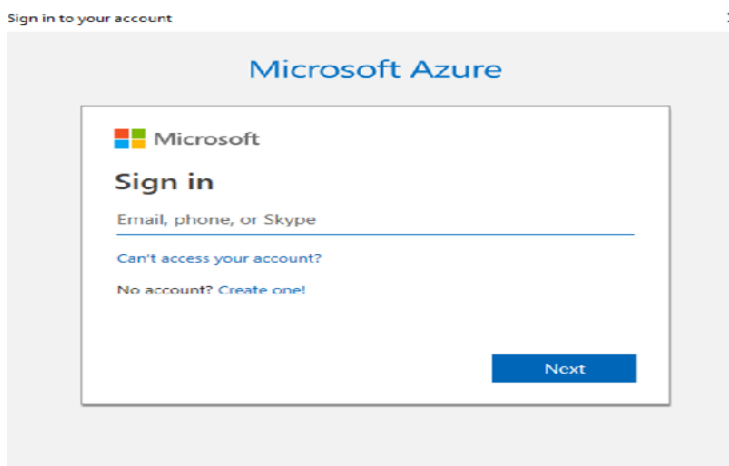
- Enter the azure UserName and click on Next shows below screen



- After Azure login was successful, It creates the WebApplications in azure takes some time and shows the below screen



- In Order to Publish the Azure Web Applications, again asks you to login azure as below
- Login to azure using service admin/co-admin role to deploy web applications



- Enter the azure Username and click on Next shows below screen



- After completing the azure Login , azure components will be published

Below applications will be created in azure

Note: If your organization name is “org123456789” then <xxxxx> will <12345>

App Service plan

- 1) IMSAppServicePlan

This is the Appservice Plan for all the azure components.

WebApp

- 2) “IMSAppPrintAll<xxxxx>”

This is used to download multiple extension document files and convert them to single pdf.

- 3) “IMSAppBinder<xxxxx>”

This is used to download selected files and convert them into single pdf in user defined sequence.

- 4) “IMSAppForms<xxxxx>”

This is used to Populate data into forms from CRM and portal.

- 5) “IMSAppWebJob<xxxxx>”

This app is placeholder for all the web jobs required to update data back in CRM.

Storage Account

- 6) “imsappformstrg<xxxxx>”

This holds all the forms and mappings on the blobs and maintain forms, form versions and form version history under tables.

Home > All resources > imsappformstrge12345 - Blobs > forms

forms
Container

Search (Ctrl+/)

Overview
Access Control (IAM)
Settings
Access policy
Properties
Metadata

Upload Refresh Delete Acquire lease Break lease View snapshots Create snapshot

Azure now supports using Role-Based Access Control (RBAC) to manage access to blobs. Learn more. →

Location: forms

Search blobs by prefix (case-sensitive) ☐ Show deleted blobs

NAME	MODIFIED	ACCESS TIER	BLOB TYPE	SIZE	LEASE STATE
023c906c-600d-4a3a-80d9-260a3660f5ec.pdf	10/15/2018, 4:11:29 PM		Block blob	874.75 KiB	Available
0252360b-7a8c-45c3-a224-4fdef598a534.pdf	10/15/2018, 4:11:30 PM		Block blob	410.54 KiB	Available
03fec6e6-d0cb-4036-99f6-b3d15f96f087.pdf	10/15/2018, 4:11:32 PM		Block blob	321.15 KiB	Available
05dbbc31-2db9-43d4-96b7-8f6d76e48653.pdf	10/15/2018, 4:11:33 PM		Block blob	202.48 KiB	Available
06da2ee9-4653-4bf7-91fc-3d03466a4b8b.pdf	10/15/2018, 4:11:34 PM		Block blob	569.03 KiB	Available
0da4119b-f539-4c61-b63e-812ba8e96390.pdf	10/15/2018, 4:11:36 PM		Block blob	298.04 KiB	Available

Home > imsappformstrge12345 - Blobs > mappings

mappings
Container

Search (Ctrl+/)

Overview
Access Control (IAM)
Settings
Access policy
Properties
Metadata

Upload Refresh Delete Acquire lease Break lease View snapshots Create snapshot

Azure now supports using Role-Based Access Control (RBAC) to manage access to blobs. Learn more. →

Location: mappings

Search blobs by prefix (case-sensitive) ☐ Show del

NAME	MODIFIED	ACCESS TIER	BLOB TYPE	SIZE	LE
023c906c-600d-4a3a-80d9-260a3660f5ec.txt	10/15/2018, 4:12:43 PM		Block blob	84.49 KiB	At
0252360b-7a8c-45c3-a224-4fdef598a534.txt	10/15/2018, 4:12:44 PM		Block blob	23.12 KiB	At
03fec6e6-d0cb-4036-99f6-b3d15f96f087.txt	10/15/2018, 4:12:45 PM		Block blob	10.56 KiB	At
05dbbc31-2db9-43d4-96b7-8f6d76e48653.txt	10/15/2018, 4:12:46 PM		Block blob	22.88 KiB	At
06da2ee9-4653-4bf7-91fc-3d03466a4b8b.txt	10/15/2018, 4:12:47 PM		Block blob	47.85 KiB	At
0da4119b-f539-4c61-b63e-812ba8e96390.txt	10/15/2018, 4:12:48 PM		Block blob	8.83 KiB	At
0e3cb9ab-42cc-4631-87fe-80455b2004b5.txt	10/15/2018, 4:12:49 PM		Block blob	19.25 KiB	At

7) "imsappstorageacc<xxxxx>"

All the attachments saved in CRM documents are stored here.

KeyVault

8) "ImsAppKeyVaults<xxxxx>"

All the username passwords and sensitive information related to the organization will be stored here.

App Insight

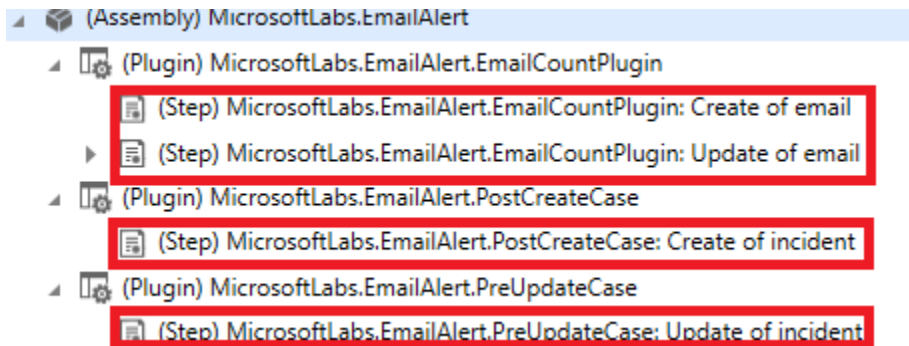
9) "ImsAppInsight<xxxxx>"

It will maintain all the logs related to AppService storage account.

Note: Follow troubleshooting steps in case of any of the above applications failed during deployment.

5. Post Deployment Configuration

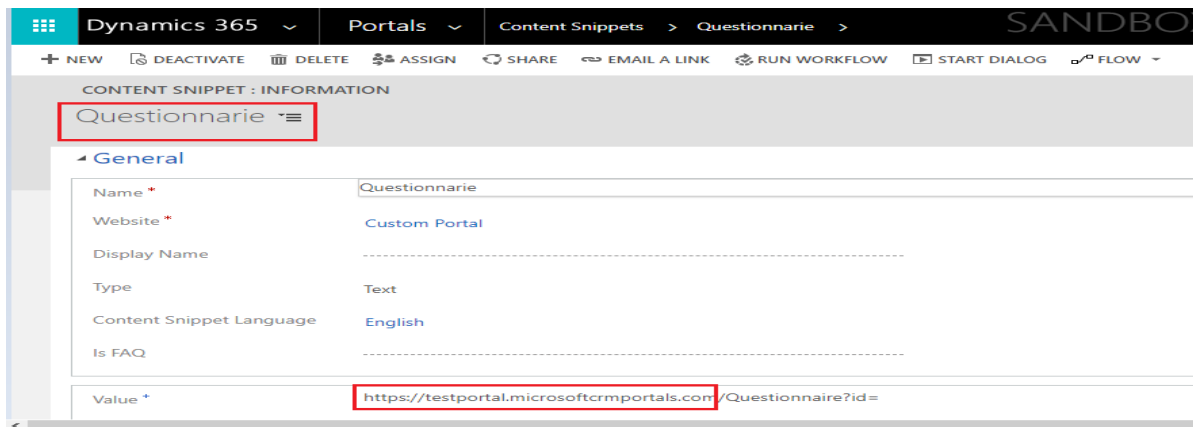
Below Plugin steps **“Run in user’s context”** should change to **Admins User** (Person who is having system admin role) using plugin registration tool



5.1 CRM Configurations

Adding portal URL in content snippet entity in Questionnaire record as shown below

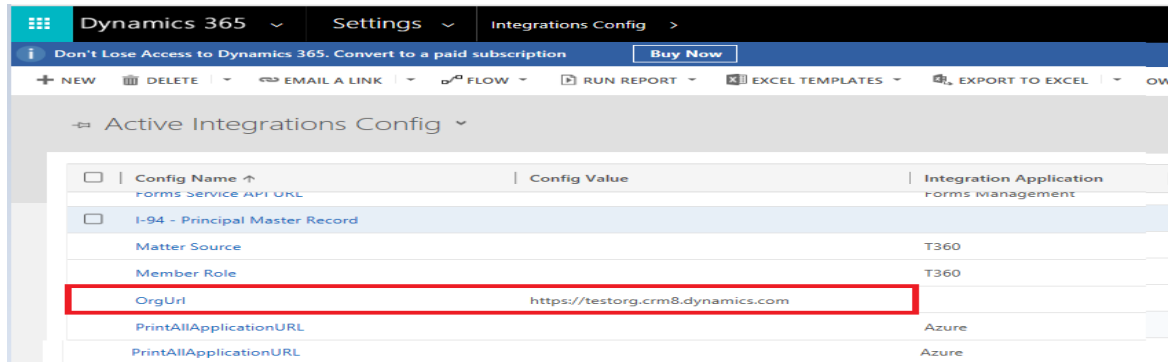
- Navigate to CRM -> Portals -> Content Snippets
- Open “Questionnaire” record and update the value field as shown below



- Change the URL with your organization configured CRM portal as given below
 - “CRM Portal URL”/Questionnaire?id=
 - Example: <https://<your portal >.microsoftcrmportals.com/Questionnaire?id=>

Update “Integration Config”

- Navigate to CRM -> Settings -> IntegrationsConfig
- Open “OrgUrl” record and update the Config Value field with organization URL as shown below

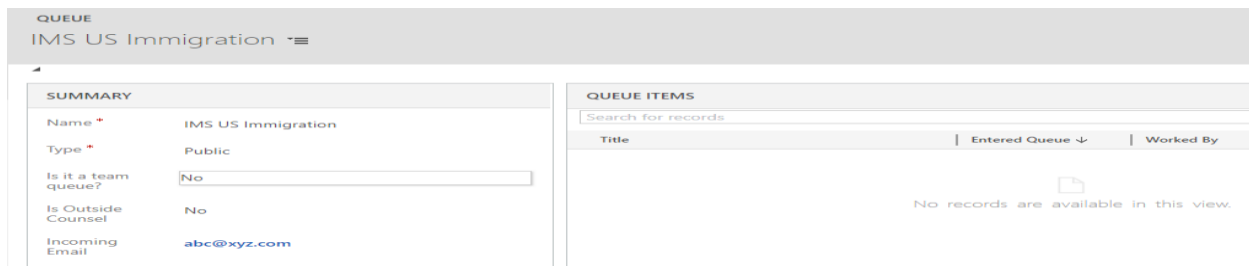


The screenshot shows the Dynamics 365 interface with the 'Integrations Config' section active. A table lists configuration records. The 'OrgUrl' record is highlighted with a red box.

Config Name	Config Value	Integration Application
I-94 - Principal Master Record		Forms management
Matter Source		T360
Member Role		T360
OrgUrl	https://testorg.crm8.dynamics.com	
PrintAllApplicationURL		Azure
PrintAllApplicationURL		Azure

Queue and MailBox Configuration

Configure below queue and mailbox for all the communication through IMS CRM instance , update the Incoming mail with your organization email .



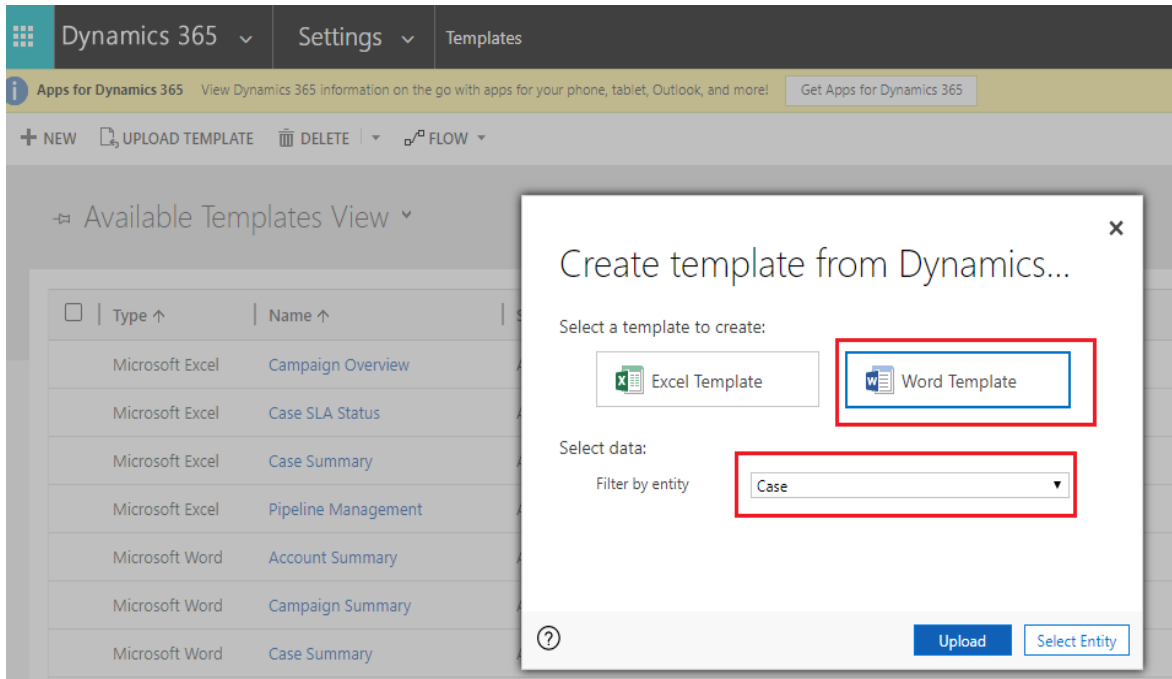
The screenshot shows the Dynamics 365 interface for the 'QUEUE' section, specifically for 'IMS US Immigration'. The 'SUMMARY' section contains the following fields:

Field	Value
Name	IMS US Immigration
Type	Public
Is it a team queue?	No
Is Outside Counsel	No
Incoming Email	abc@xyz.com

The 'QUEUE ITEMS' section is empty, showing a message: "No records are available in this view."

QR Code Update for Binder

- Create Word Template in CRM as shown below
- Navigate to CRM -> Settings -> Templates -> Document Templates

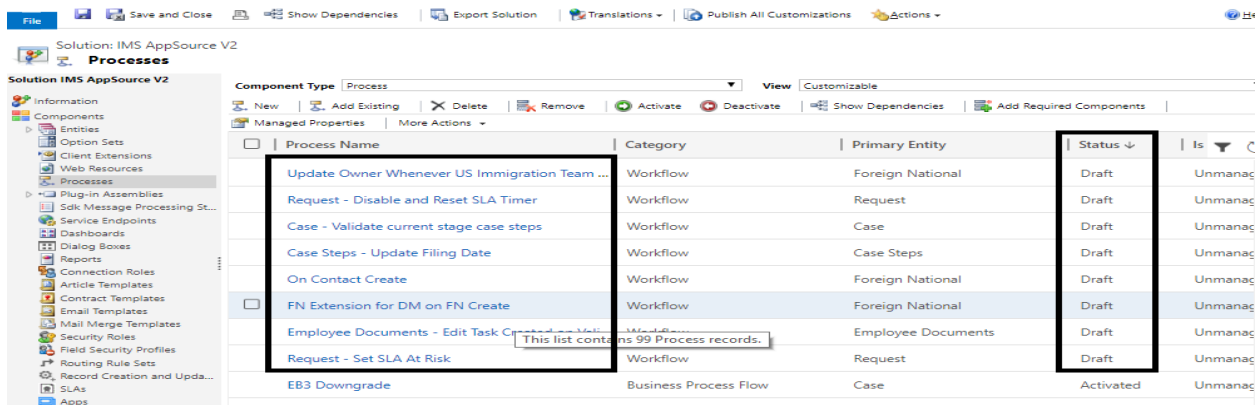


Download the QR CODE Document from the GITHUB (<https://github.com/microsoftappsource/IMS/tree/master/DocumentTemplates>) and Upload the document.

Workflow Activation:

Go to CRM settings → solutions → open “IMSAppSourceV2” → select “processes” under components as shown in below screen.

Note all draft processes and now go to settings → processes and activate them.

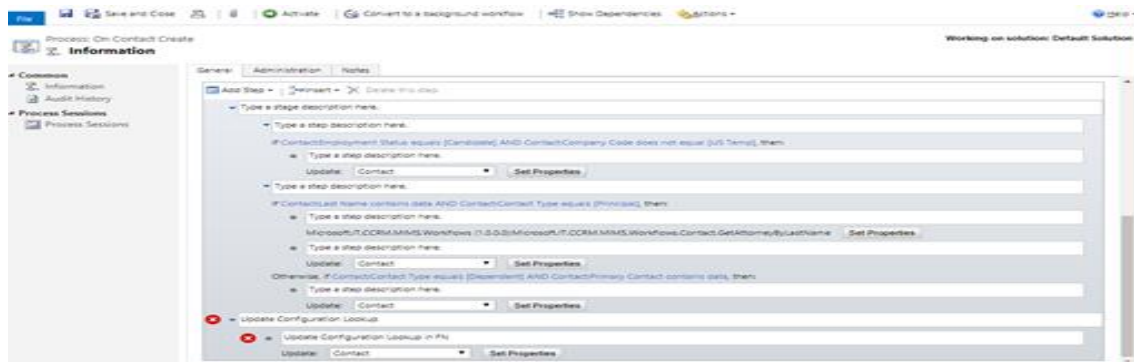


Activation of Workflows:

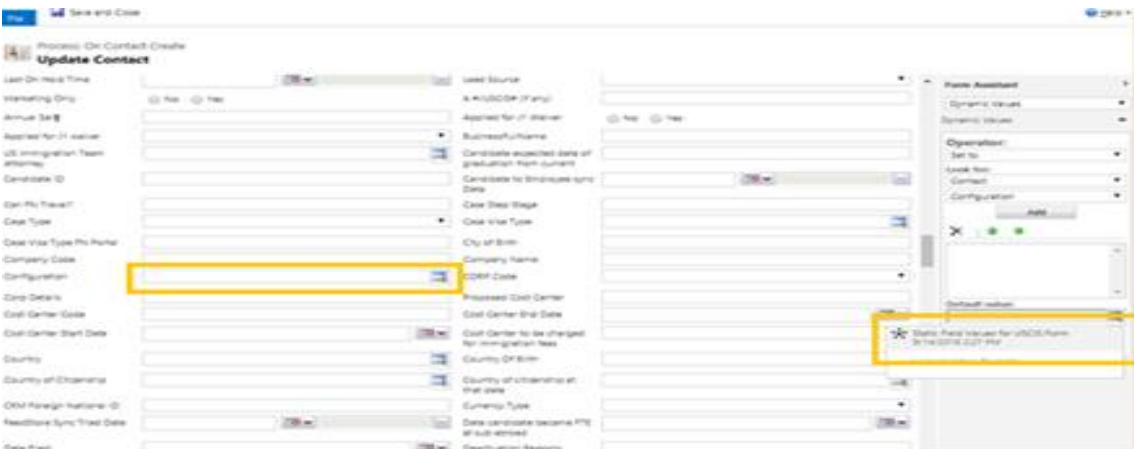
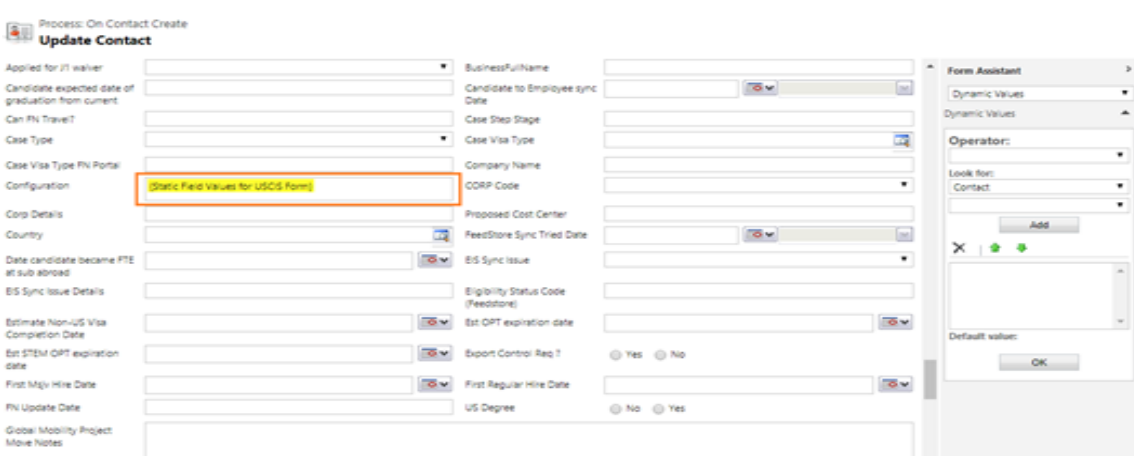
Please follow the below steps to activate the draft workflows.

1. On Contact Create:

1a. Click set Properties in the step which is showing error.



1b. Remove the value in the configuration field and add the value again.



1c. Save and close the window after adding the value into configuration field.

1d. Activate the workflow.

2. Case - Update Case Type on Template name Update

2a. Click set Properties in the step which is showing error.

2b. Remove the value in the configuration field and add the value again.

Process: Case - Update Case Type on Template name Update

Update Case

Assigned To	<input type="text"/>	Source CaseID	<input type="text"/>
Binder Ready date	<input type="text"/>	BPP	<input type="text"/>
BPP Stage	<input type="text"/>	Business Hours End (HH:MM)	<input type="text"/>
Business Hours Start (HH:MM)	<input type="text"/>	Case Stage Completed	<input type="text"/>
Case Template	<input type="text"/>	old_Case Type	<input type="text"/>
old_Category	<input type="text"/>	Category	<input type="text"/>
Closed On	<input type="text"/>	Configuration	<input type="text" value="Static Field Values for USCIS Form"/>
Consular Processing Country/Region	<input type="text"/>	Contains Questionnaire Template	<input type="text"/>
Cost Center Code	<input type="text"/>	Cost Center to be charged for immigration fees	<input type="text"/>
Current Case Step	<input type="text"/>	Current Queue Name	<input type="text"/>
Exec Org/Manager	<input type="text"/>	Date Filed	<input type="text"/>
Date Initiated	<input type="text"/>	Date LCA Requested	<input type="text"/>
Date LCA Requested from DOL	<input type="text"/>	Date of first advertisement identified in question	<input type="text"/>
Date TRU/Permit Filed?	<input type="text"/>	Denied Date	<input type="text"/>
2 Denied Reasons	<input type="text"/>		

Form Assistant

Dynamic Values

Operator:

Look for:

Case

Add

Default value:

OK

2c. Save and close the window after adding the value into configuration field.

Process: Case - Update Case Type on Template name Update

Update Case

Assigned To	<input type="text"/>	Source CaseID	<input type="text"/>
Binder Ready date	<input type="text"/>	BPP	<input type="text"/>
BPP Stage	<input type="text"/>	Business Hours End (HH:MM)	<input type="text"/>
Business Hours Start (HH:MM)	<input type="text"/>	Case Stage Completed	<input type="text"/>
Case Template	<input type="text"/>	old_Case Type	<input type="text"/>
old_Category	<input type="text"/>	Category	<input type="text"/>
Closed On	<input type="text"/>	Configuration	<input type="text" value="Static Field Values for USCIS FormConfiguration"/>
Consular Processing Country/Region	<input type="text"/>	Contains Questionnaire Template	<input type="text"/>
Cost Center Code	<input type="text"/>	Cost Center to be charged for immigration fees	<input type="text"/>
Current Case Step	<input type="text"/>	Current Queue Name	<input type="text"/>
Exec Org/Manager	<input type="text"/>	Date Filed	<input type="text"/>
Date Initiated	<input type="text"/>	Date LCA Requested	<input type="text"/>
Date LCA Requested from DOL	<input type="text"/>	Date of first advertisement identified in question	<input type="text"/>
Date TRU/Permit Filed?	<input type="text"/>	Denied Date	<input type="text"/>
2 Denied Reasons	<input type="text"/>		

Form Assistant

Dynamic Values

Operator:

Set to

Look for:

Case

Configuration

Add

Default value:

Static Field Values for USCIS Form

OK

2d. Activate the workflow.

2. Employee Documents - Assign Pending Status Documents To Integreon :

3a. Click set Properties in the step which is showing error.

PowerApps

File Save and Close Activate Convert to a real-time workflow Show Dependencies Actions

Process: Employee Documents - Assign Pending Status Documents To Integreon

Information

Common Information Audit History Process Sessions Process Sessions

General Administration Notes

Hide Process Properties

Process Name Employee Documents - Assign Pending

Entity Employee Documents

Category Workflow

Options for Automatic Processes

Scope Organization

Start when Record is created Record status changes Record is assigned Record fields change Record is deleted

Available to Run

Run this workflow in the background (recommended)

As an on-demand process

As a child process

Workflow Job Retention

Automatically delete completed workflow jobs (to save disk space)

Add Step Insert Delete this step

Proceed only if Document Status is Pending

If Employee Documents.Document Status equals (Pending), then

Type a step description here.

Microsoft.IT.COM.MMS.Workflows (1.0.0.0)Microsoft.IT.COM.MMS.Workflows.EmployeeDocuments.AssignDocumentToIntegronQueue Set Properties

3b. Set the Value of the queue field to Process Team 1.

Secure https://hclcc.crm.dynamics.com/SFA/Workflow/customactivityform.aspx?activityname=CustomActivityStep3&customstep...

File Save and Close

Process: Employee Documents - Assign Pending Status Documents ...

Set Custom Step Input Properties

Working on solution: Default Solution

Property Name	Data Type	Required	Value
queue	Lookup	Required	

Form Assistant

Dynamic Values

Operator:

Set to

Look for:

Employee Documents

<Attorney>

<Business Admins>

<Business Application Platform Servic...>

<Canada>

<Delegated Admin>

<Demo User>

<Demo User>

<Demo User>

<Demo User>

<Demo User>

Look Up More Records

File Save and Close

Process: Employee Documents - Assign Pending Status Documents ...

Set Custom Step Input Properties

Property Name

queue

Lookup Record

Enter your search criteria.

Look for Queue

Show Only My Records

Look in Queues Lookup View

Search Search for records

Name
<Power>
<VOC Push Service>
<Business Admins>
<Process Team 1>
<Paralegal>
<Process Legal>

1 - 47 of 47 (1 selected)

Page 1

New Add Cancel Remove Value

3c. Save and close the window, now the step should not show any error.

Set Custom Step Input Properties - Microsoft Dynamics 365 - Google Chrome

Secure | <https://hdcc.crm.dynamics.com/SFA/Workflow/customactivityform.aspx?activityname=CustomActivityStep3&customstep...>

File Save and Close

Process: Employee Documents - Assign Pending Status Documents ... Working on solution: Default Solution

Set Custom Step Input Properties

Property Name	Data Type	Required	Value
queue	Lookup	Required	<<Process Team 1>>

Form Assistant

Dynamic Values

Operator:

Set to

Look for:

Employee Documents

Add

Default value:

<<Process Team 1>>

OK

3d. Activate the workflow.

Secure | <https://hdcc.crm.dynamics.com/sfa/workflow/ndt.aspx?id=%7b7a208af03-4810-4DC8-B067-4818FAE9112E%7d>

PowerApps

File Save and Close Activate Convert to a new workflow Show Dependencies Actions

Process: Employee Documents - Assign Pending Status Documents To Integration Working on solution: Default Solution

Information

General Administration Notes

Hide Process Properties

Process Name: Employee Documents - Assign Pending

Activate As: Process

Available to Run

☒ Run this workflow in the background (recommended)

☐ As an on-demand process

☐ As a child process

Workflow Job Retention

☒ Automatically delete completed workflow jobs to save disk space

Summary

Entity: Employee Documents

Category: Workflow

Options for Automatic Processes

Scope: Organisation

Start when:

☒ Record is created

☐ Record status changes

☐ Record is assigned

☒ Record field change

☐ Record is deleted

Add Step + | Insert + | Delete this step

Process only if Document Status is Pending

If Employee Documents (Document Status is Pending), then

Type a step description here

Microsoft CRM (MIME) Workflow (7.0.0.0) Microsoft CRM (MIME) Workflow Employee Documents Assign Document To Integration Queue Set Properties

3. Generate Letter Document from Word Template

4a. Click set Properties in the step which is showing error. Save and close the window.

Property Name	Data Type	Required	Value
SelectedTemplate	Lookup	Required	{Document Template Identifier}
Target	Lookup	Required	{Case Id Case Letters}

4b. Activate the Workflow

Process: Generate Letter Document from Word Template

General | Administration | Notes

Process Name: Generate Letter Document from Word Template

Entity: Case Letters

Available to Run

- ☒ Run this workflow in the background (recommended)
- ☐ As an on-demand process
- ☐ As a child process

Workflow Job Retention

- ☒ Automatically delete completed workflow jobs (to save disk space)

Options for Automatic Processes

Scope: Organization

Start when: ☒ Record is created

Record is created

Record status changes

Record is assigned

Record fields change

Record is deleted

4. Generate QR Document from Word Template

5a. Click set Properties in the step which is showing error.

Process: Generate QR Document from Word Template

General | Administration | Notes

Process Name: Generate QR Document from Word Template

Entity: Case Letters

Available to Run

- ☒ Run this workflow in the background (recommended)
- ☐ As an on-demand process
- ☐ As a child process

Workflow Job Retention

- ☒ Automatically delete completed workflow jobs (to save disk space)

Options for Automatic Processes

Scope: Organization

Start when: ☒ Record is created

Record is created

Record status changes

Record is assigned

Record fields change

Record is deleted

Add Step | Insert | Delete this step

Type a step description here.

If CaseCandidate contains data, then:

- Create Word Document for QR Code
- Action: SetWordTemplate Entity: None (global) Set Properties
- Type a step description here.
- Create: Case Documents Set Properties

5b. Check if the selected template is QRCODE, If it is not filled fill it with QR code.

Property Name	Data Type	Required	Value
selectedTemplate	Lookup	Required	QRCODE
target	Lookup	Required	{Case(Case)}

Form Assistant

Operator: Set to

Look for: Case

Add

Default value:

OK

5c. Save and close the window.

5d. Activate the workflow

PowerApps

Process: Generate QR Document from Word Template

Working on solution: Default Solution

General Administration Notes

Hide Process Properties

Process Name: Generate QR Document from Word Template

Entity: Case

Category: Workflow

Available to Run

Run this workflow in the background (recommended) ☒

As an on-demand process ☐

As a child process ☐

Workflow Job Retention

Automatically delete completed workflow jobs to save disk space ☒

Options for Automatic Processes

Scope: Organization

Start when: ☒ Record is created ☐ Record status changes ☐ Record is assigned ☐ Record fields change ☐ Record is deleted

Step description: None provided.

If CaseCandidate contains data, then:

- Create Word Document for QR Code. Action: SetWordTemplate Entity: View properties
- Create: Case Documents View properties
- Microsoft.IT.CCRM.MMS.Workflows (1.0.0.0) Microsoft.IT.CCRM.MMS.Workflows.CaseLetter.AssociateDocumentToCaseLetter View properties

6) Send Invitation

6a. Open "Set properties" of Update FN Portal role step.

Process: Send Invitation

Information

Common

Information

Audit History

Process Sessions

Process Sessions

General Administration Notes

Workflow Job Retention

☒ Automatically delete completed workflow jobs (to save disk space)

☐ Record is assigned

☐ Record fields change

☐ Record is deleted

Select

Add Step + Insert X Delete this step

Type a step description here.

Update: Invitation Set Properties

Encode invitation Code

PortalsEncode Invitation Code Set Properties

Create an email to act as an email template

Create: Email Set Properties

Send emails to all invitees

PortalsSend Invitation Set Properties

Update invitation to Sent

Change record status to: Invitation Sent

Update FN Portal Role

PortalsAssign Web Role Set Properties

6b. Check if the web role field is filled. If not, set the field to “IMS Portal Admin”. Save and close the form.

Set Custom Step Input Properties - Microsoft Dynamics 365 - Google Chrome

https://hcliff.crm.dynamics.com/SFA/Workflow/customactivityform.aspx?activityname=CustomActivityStep6&customstepcatego...

File Save and Close

Process: Send Invitation

Set Custom Step Input Properties

Working on solution: Default Solution

Property Name	Data Type	Required	Value
Account	Lookup	Optional	
Contact	Lookup	Optional	[Invite Contact(Invitation)]
Invitation	Lookup	Optional	
User	Lookup	Optional	
Web Role	Lookup	Required	[IMS Portal Admin]

Form Assistant

Dynamic Values

Dynamic Values

Operator:

Set to

Look for:

Invitation

Add

Default value:

IMS Portal Admin

OK

6c. Activate the workflow.

File Save and Close

Activate Convert to a real-time workflow Show Dependencies Actions

Process: Send Invitation

Information

Common

Information

Audit History

Process Sessions

Process Sessions

General Administration Notes

Workflow Job Retention

☒ Automatically delete completed workflow jobs (to save disk space)

☐ Record is assigned

☐ Record fields change

☐ Record is deleted

Select

Add Step + Insert X Delete this step

Type a step description here.

Update: Invitation Set Properties

Encode invitation Code

PortalsEncode Invitation Code Set Properties

Create an email to act as an email template

Create: Email Set Properties

Send emails to all invitees

PortalsSend Invitation Set Properties

Update invitation to Sent

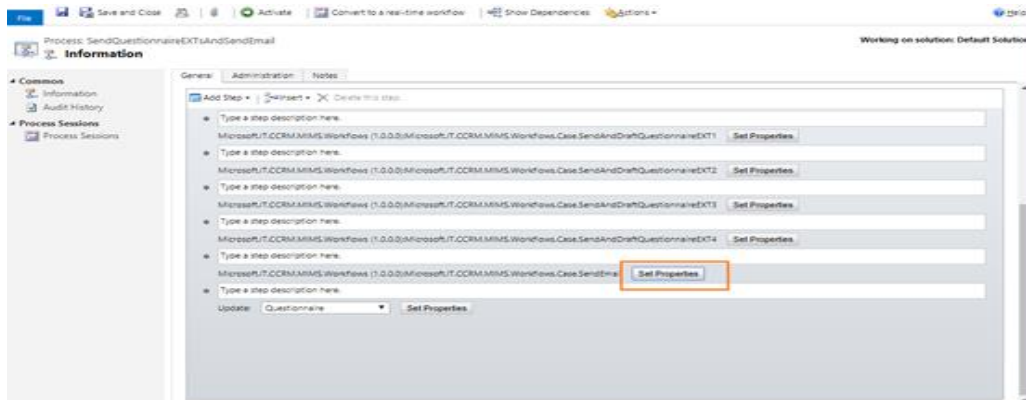
Change record status to: Invitation Sent

Update FN Portal Role

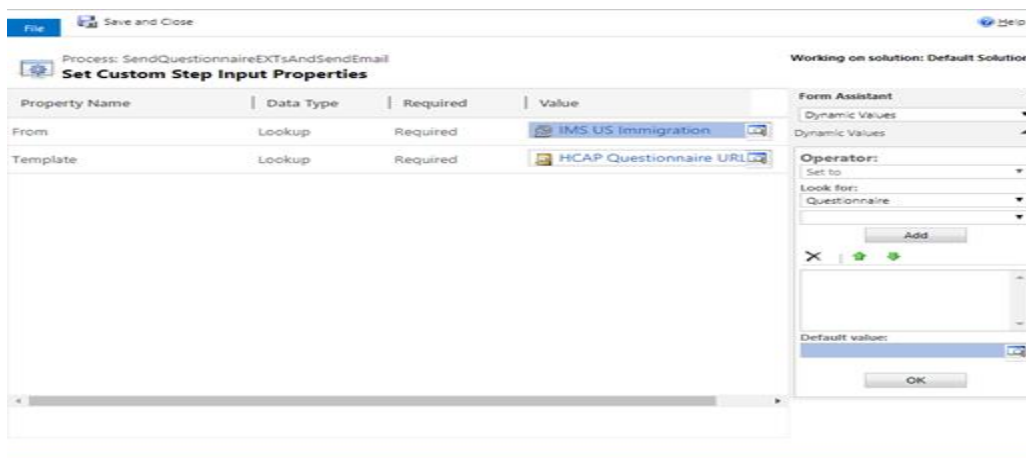
PortalsAssign Web Role Set Properties

7. SendQuestionnaireEXTsAndSendEmail

7a. Open Set Properties of send email step.

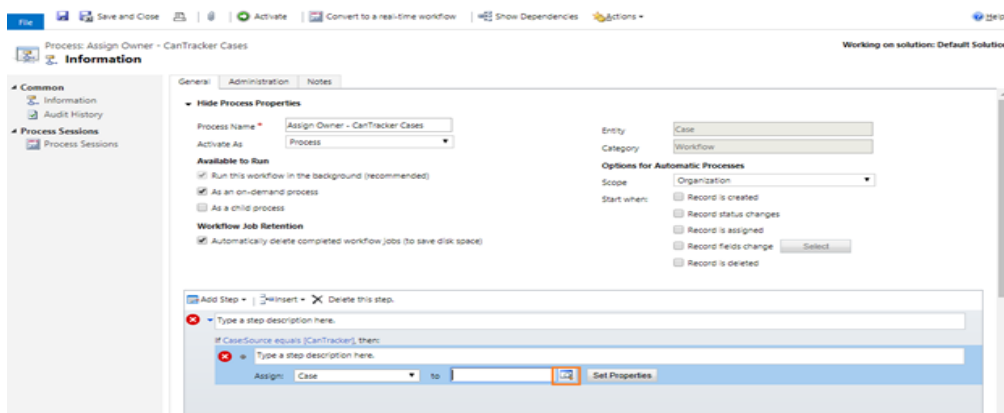


7b. Check if the From field is filled. If not, fill the field with “IMS US Immigration”. Save and close the form.

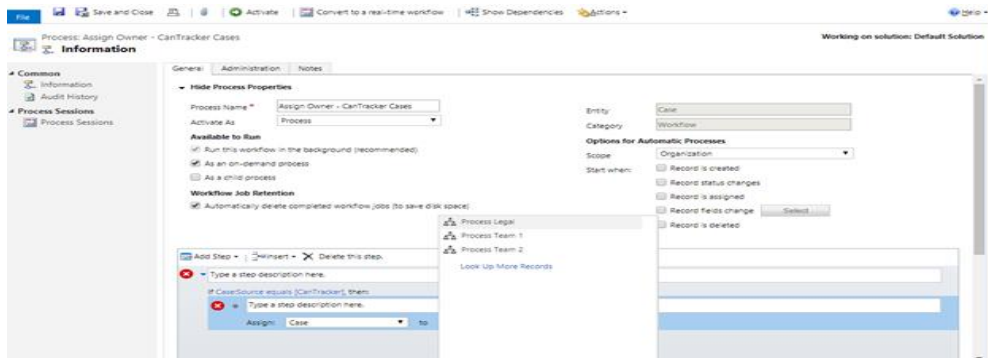


8. Assign Owner - CanTracker Cases

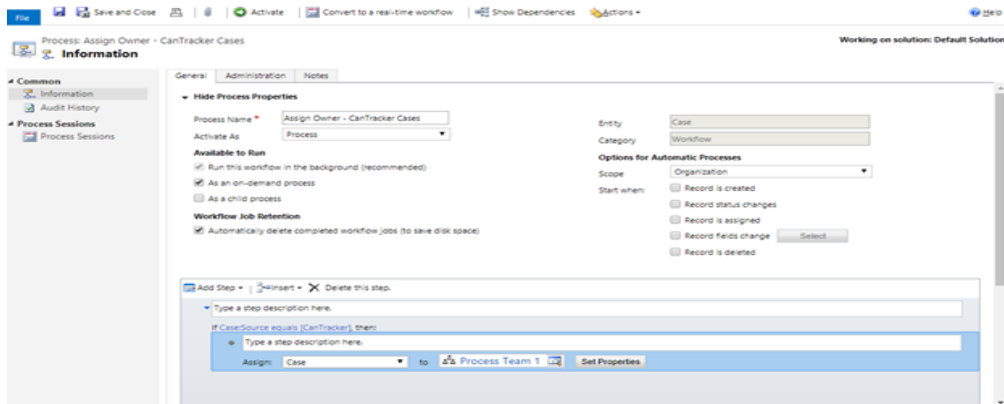
8a. Click on the lookup button as shown in the below screenshot.



8b. Fill the field with “Process Team1”.



8c. Activate the workflow.



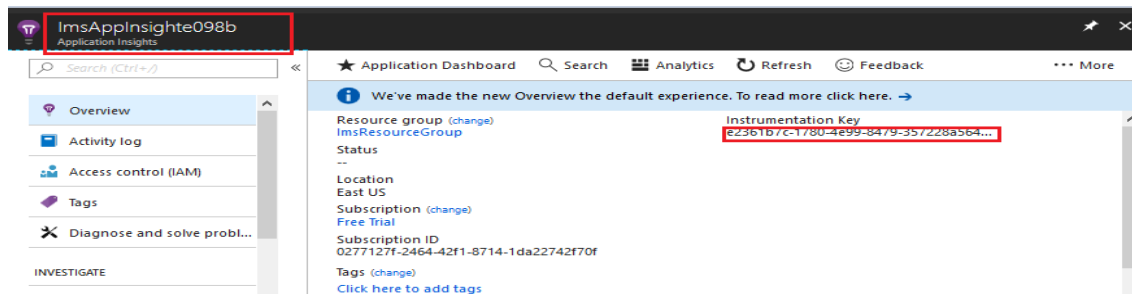
Documents Storage:

- Navigate to CRM -> Settings -> Extensions -> Integration Config
- Update the below config name values

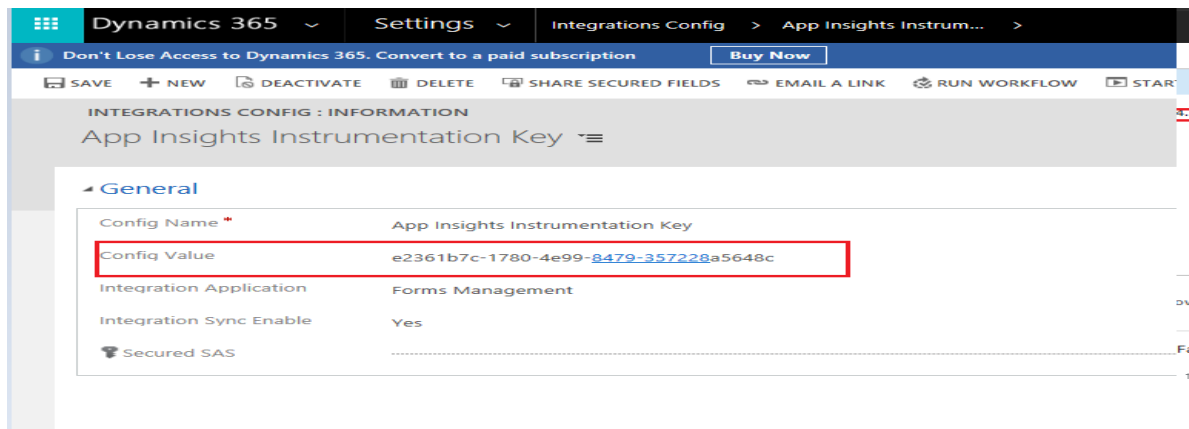
NOTE : Azure component names appear on document are same but on azure portal component names will end with your CRM Organization Unique Name (for ex:your CRM org name:org12345678 , on the Azure portal component names end with ComponentName12345 like : IMSAppPrintAll12345)

1. App Insights Instrumentation Key

- Navigate to Azure
- Open the Resource "IMSAppStorageAppInsight<xxxxx>" as shown below

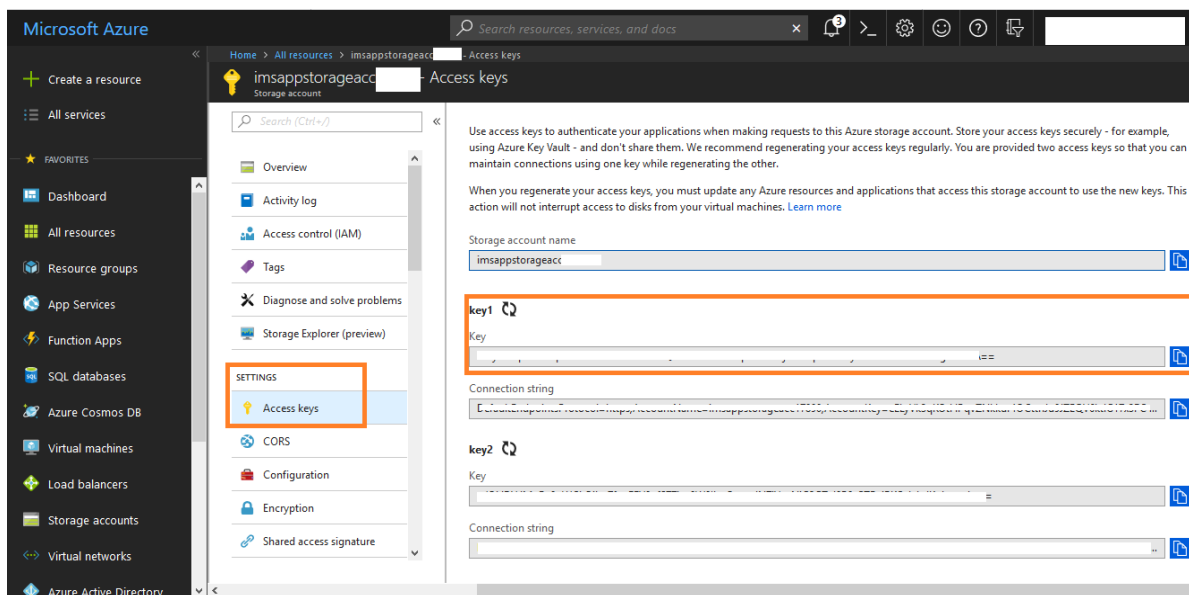


- Copy the Instrumentation Key and update the Config Value in **App Insights Instrumentation Key** as shown below



2. Azure Storage Account key

- Navigate to Azure
- Open the Resource "imsappstorageacc<xxxxx>" as shown below
- Go to Access Keys under Settings, Copy **key1 val**



- Navigate to Settings -> Integrations Config Entity and Update the Key Value in **Azure Storage Account key** Record “**config value**” field as shown below

SAVE + NEW DEACTIVATE DELETE SHARE SECURED FIELDS EMAIL A LINK RUN WORKFLOW START DIALOG FLOW ...

INTEGRATIONS CONFIG : INFORMATION

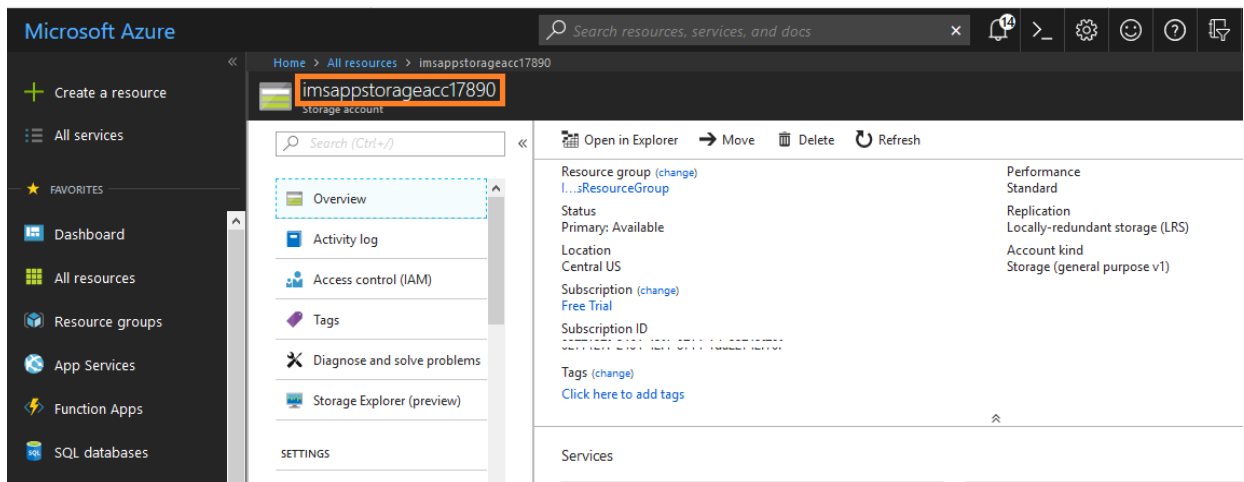
Azure Storage Account key

General

Config Name *	Azure Storage Account key
Config Value	0HH/Ya9xKzdExiqIg0foWXb8P/oqiqYa5kUChwlh3Xkl2kVUuqN5Y4g1W6eFIPvu9P3E96wdK4rZeB93+iAlig==
Integration Application	Azure
Integration Sync Enable	Yes
Secured SAS	

3. Azure Storage Account Name

- Navigate to Azure
- Open the Resource “imsappstorageacc<xxxx>” as shown below
- Copy the storage account name as shown in below screenshot



- Navigate to Settings -> Integrations Config Entity and Update the Account Name Value in Azure Storage Account Name Record “**config value**” field as shown below

Dynamics 365 ▾ **Settings** ▾ **Integrations Config** > **Azure Storage Account** >

Don't Lose Access to Dynamics 365. Convert to a paid subscription [Buy Now](#)

SAVE + NEW DEACTIVATE DELETE SHARE SECURED FIELDS EMAIL A LINK RUN WORKFLOW START DIALOG FLOW

INTEGRATIONS CONFIG : INFORMATION

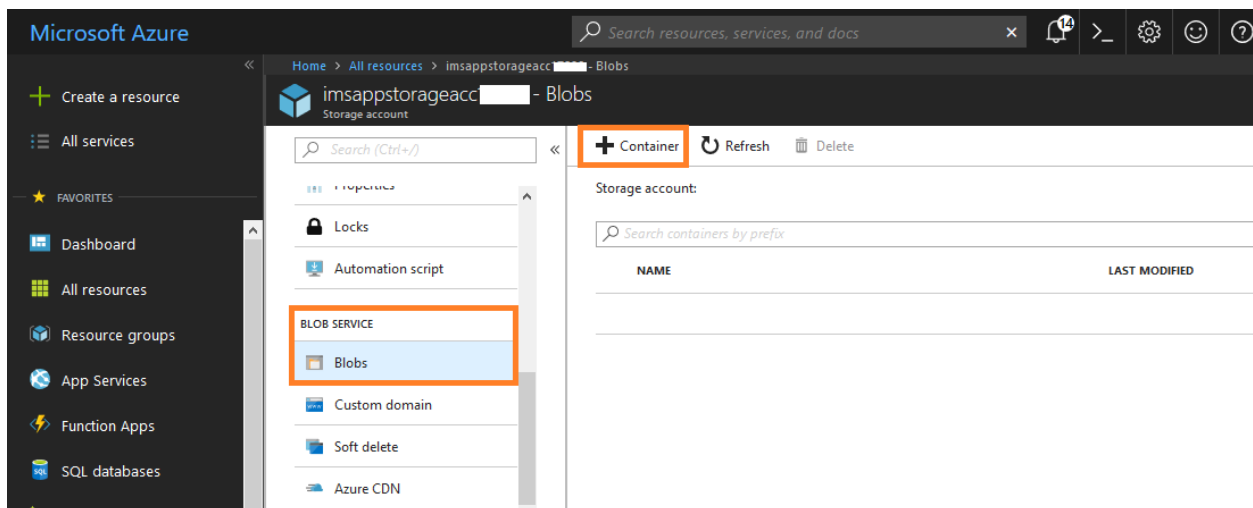
Azure Storage Account Name ▾

General

Config Name *	Azure Storage Account Name	imsappstorageaccf3a5b
Config Value	imsappstorageaccf3a5b	
Integration Application	Azure	
Integration Sync Enable	Yes	
Secured SAS		

4. Azure Storage Container

- Navigate to Azure
- Open the Resource “imsappstorageacc<xxxx>” as shown below
- Go To Blobs in **Blob Service** and create the container as below



Provide name[user defined] and click on ok. name [user define] update on azure storage container “**config value**” on CRM

New container

* Name

Public access level ⓘ

Private (no anonymous access) ▼

OK Cancel

- Copy the Container Name

imsappstorageaccf3a5b - Blobs

Storage account: imsappstorageaccf3a5b

Search containers by prefix

NAME	LA	PUBLIC ACCESS L...	LEASE STATE
storage	9/	Private	Available

Blob service

Blobs

Custom domain

Soft delete

Azure CDN

- Navigate to CRM -> settings -> Integrations Entity
- Update **Azure Storage Container** Record “**config value**” field as shown below

Dynamics 365 Settings Integrations Config Azure Storage Conta...

Don't Lose Access to Dynamics 365. Convert to a paid subscription Buy Now

SAVE + NEW DEACTIVATE DELETE SHARE SECURED FIELDS EMAIL A LINK RUN WORKFLOW START DIALOG FLOW

INTEGRATIONS CONFIG : INFORMATION

Azure Storage Container

General

Config Name * Azure Storage Container

Config Value storage

Integration Application Azure

Integration Sync Enable Yes

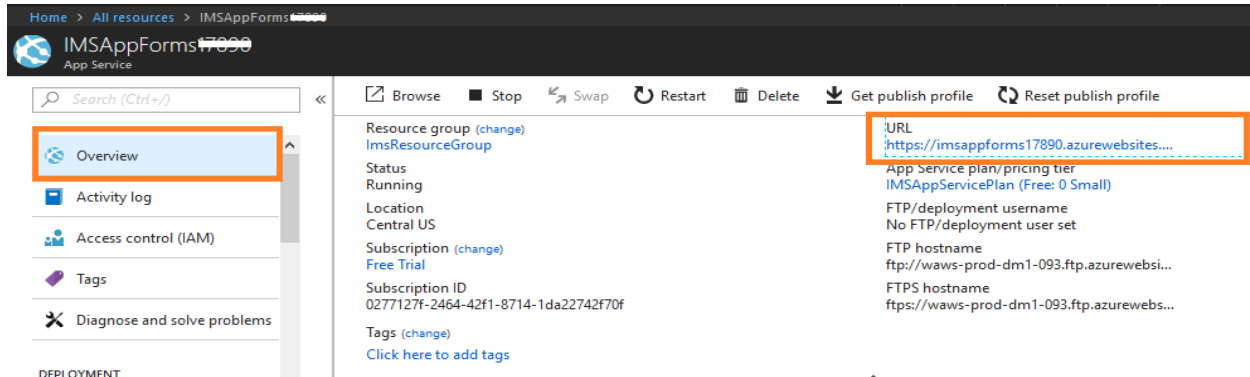
Secured SAS

5. Forms Service API URL:

- Navigate to Azure
- Open the Resource “imsappforms<xxxxx>” as shown below

- On overview select the URL as shown in below screenshot, paste it on Forms Service API URL records “**config value**” field
- After URL, add **/api/v1/forms/** for Config Value

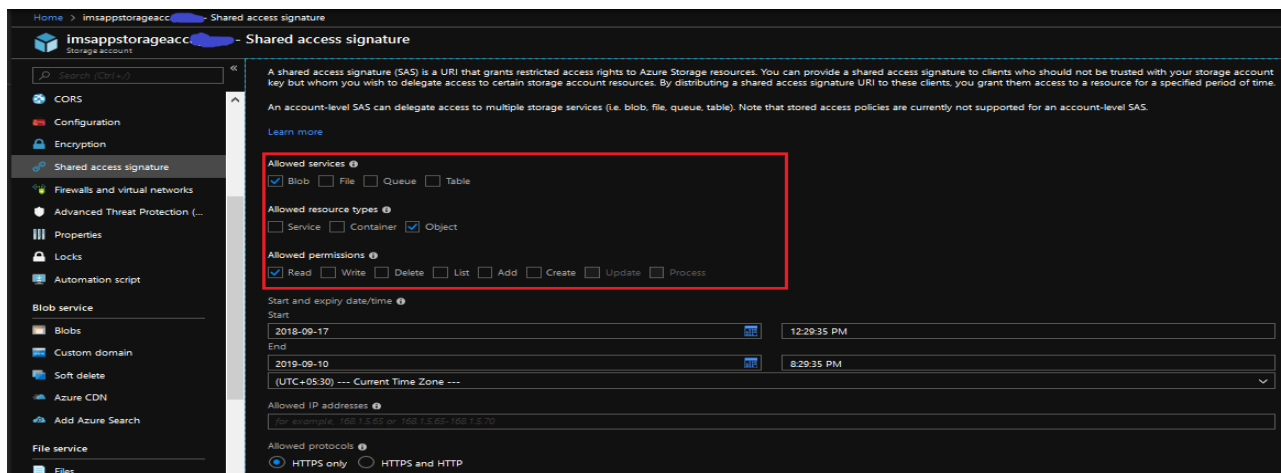
ex: <https://imsappforms82f09.azurewebsites.net/api/v1/forms/>



6) Secured SAS Token

Navigate to **imsappstorage<xxxxxx>** resource and go to shared access signature under settings tab.

Please ensure that start date and end date fields are filled with valid dates and end date is greater than the current date.



Click on Generate SAS and connection string.

Select the SAS token value as shown in below screenshots, paste it on “**Secured SAS**” field of SAS record in Integrations config in CRM.

If the SAS Key is expired , then Re Generate SAS key in azure and update the above record in crm .

The top part of the image shows the 'Settings' page in Dynamics 365, specifically the 'Shared access signature' section. A 'SAS token' is generated and highlighted with a red box. The token is a long string of characters used for authentication.

The bottom part of the image shows the 'Integrations Config' page for 'SAS'. The 'General' tab is selected, showing the 'Config Name' as 'SAS' and 'Integration Sync Enable' as 'Yes'. The 'Secured SAS' field is highlighted with a red box, indicating the token is stored securely.

5.2 Azure Configurations

NOTE : Azure component names appear on document are same but on azure portal component names will end with your CRM Organization Unique Name (for ex:your CRM org name:org12345678 , on the Azure portal component names end with ComponentName12345 like : IMSAppPrintAll12345)

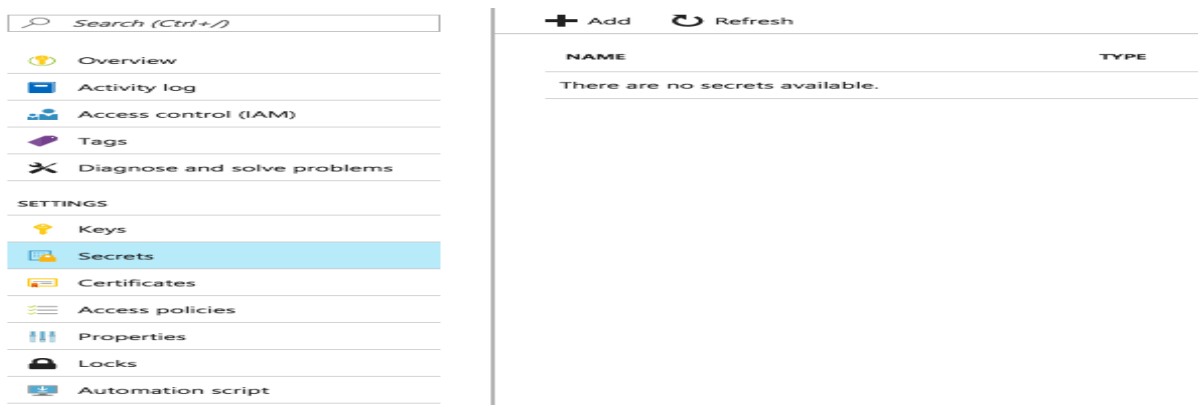
First step on azure configuration is creating key vaults. Post deployment, on azure portal you can find components named as **ImAppKeyVaults** following with Unique org id on given azure portal under user provided resource group.

ImAppKeyVaults:

Open keyvault

The screenshot shows the Azure portal interface for a key vault. The left sidebar contains navigation options like 'Overview', 'Activity log', 'Access control (IAM)', 'Tags', 'Diagnose and solve problems', 'SETTINGS', 'Keys', 'Secrets', 'Certificates', 'Access policies', and 'Properties'. The main area displays the key vault details, including the resource group, location, subscription, and subscription ID. The 'Monitoring' section shows a graph of 'Total requests (attosoil-demo)' over time.

In the Azure Key Vault settings that you just created you will see a screen similar to the following. Click Secrets in the blade, followed by Add button on the top right.



Type in your secret details:

Secret details name should be as follows(yellow highlighted)

1. Name : **BinderAdminUser** Value :[provide binder application **Run as** username] ex:abc@ee.com
2. Name : **BinderPassword** Value :[provide binder application password]
3. Name : **MIMSCRMOrgUrl** Value :[Target CRM instance organization url]
On CRM : Settings → Customization → Developer Resource →

Organization Service

SOAP Service providing access to this instance of Dynamics 365. For more information see [Use the IOrganizationService web service to read and write data or metadata.](#)

Endpoint Address

[Download WSDL](#)

4. Name : **PrintAllAdminUser** Value :[provide printall application **Run as** username] ex:abc@ee.com
5. Name : **PrintAllPassword** Value :[provide printall application password]

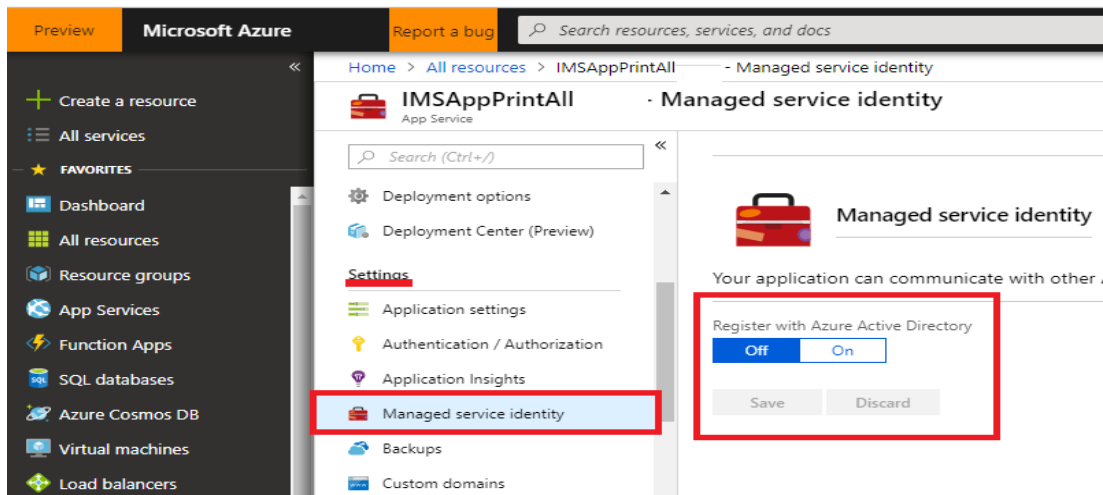
6. Name : **MIMSAppSourceAdmin** Value :[provide web job applications **Run as** username]
7. Name : **MIMSAppSourceCRMPwd** Value :[provide web job applications password]

On part on Azure Configuration now we are going to configure for **IMSAppPrintAll** following with Unique org id (web app) and **IMSAppBinder** following with Unique org id (web app) . Below steps to create/modify.

- **Managed Service Identity**

Goto Settings and select **Managed Service Identity**.

If is **ON** , don't change anything. If it is **Off**, change it to **On** and save. (After clicking on save it will take some time, wait till it save.)



Application Settings

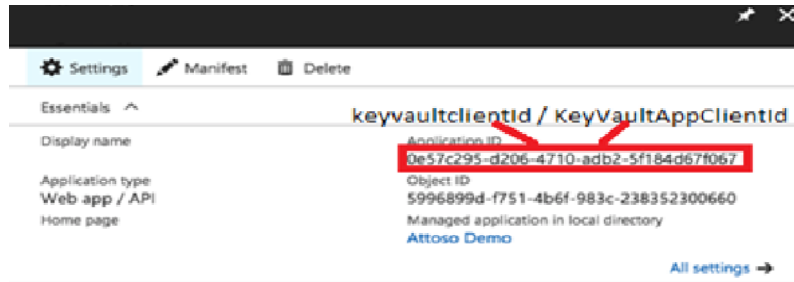
For application settings we need to create below parameters:

- 1) KeyVaultAppClientId :
- 2) keyvaultclientId
- 3) keyvaultclientsecretId

Azure Portal > Azure Active Directory > App Registrations > New Application Registration

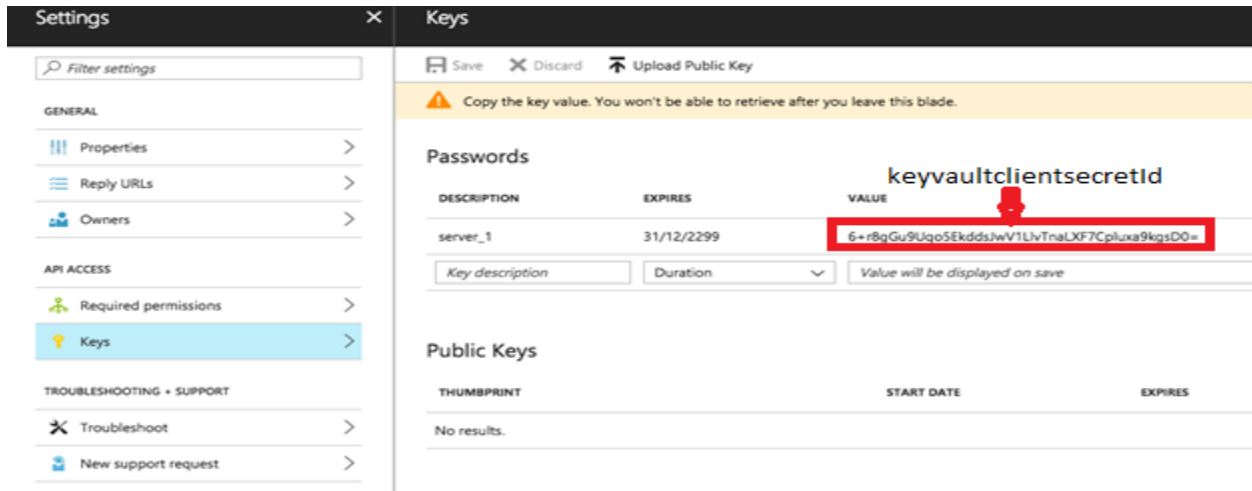
The image shows a 'Create' dialog box in the Azure Portal. It contains three main fields: 'Name' with the value 'Attosol Demo' (highlighted with a red box and the text '[User define Name]'), 'Application type' set to 'Web app / API', and 'Sign-on URL' set to 'https://www.attosol.com/login' (marked with a green checkmark). A blue 'Create' button is located at the bottom of the dialog.

Note down your details. Remember, your client id is same as Application ID.



Click on Settings in the above image and navigate to keys section as shown below

While Generating the key for any app registration Provide some user defined name in the description and select “Never expires” as the duration and save the record. A key will be generated. Take this key as the keyvaultclientsecretId.



4) keyvaulturl

Azure portal > ImsAppKeyVaults following with Unique org id > Overview > Take DNS Name

DNS Name

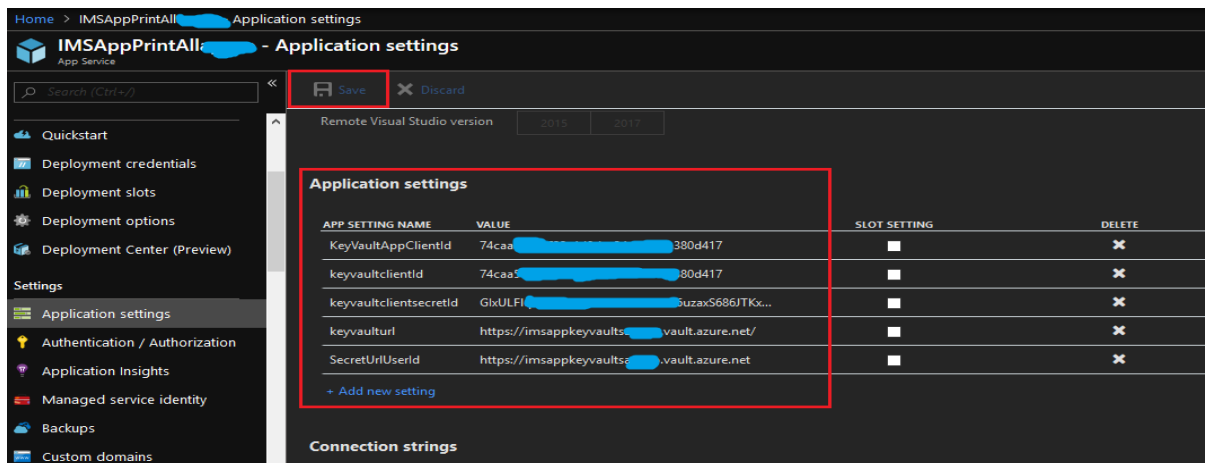
https://imsappkeyvaultsf7.vault.azure.net/

5) SecretUrlUserId

Azure portal > ImsAppKeyVaults following with Unique org id > Overview > Take DNS Name

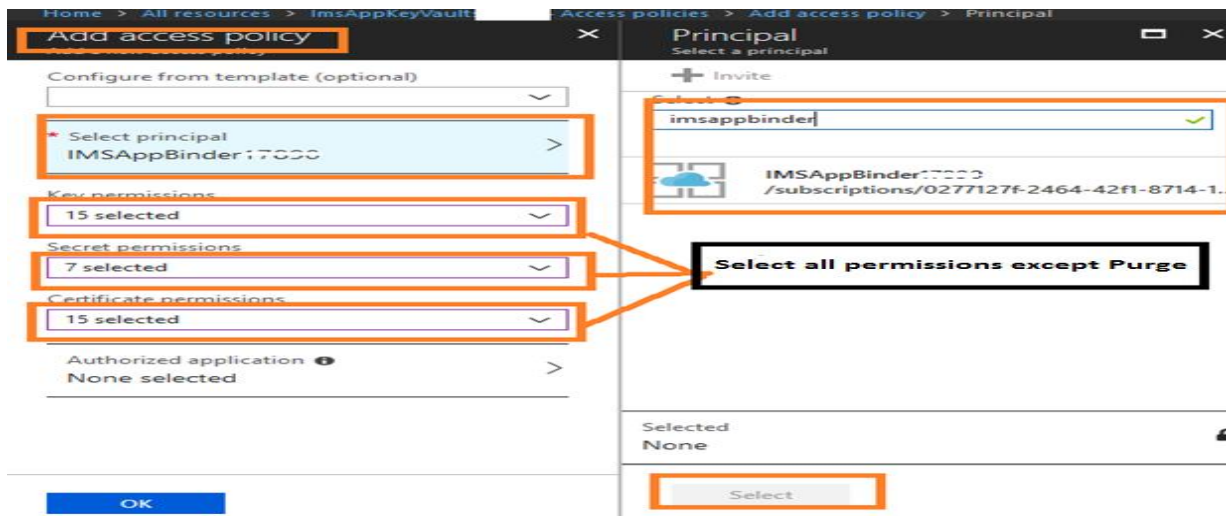
Remove last charecter (/) from url

The above setting configurations are as shown below , after enter the required application settings and save it.



Now Go to Keyvault [**IMSAppKeyVaults<xxxxxx>**]--> access policies --> click on add access policy and provide the application on select principal field

Select the application and provide the permissions except purge and click on ok.
Now save the access policies



Finally, you will see the access policy like below



For Binder and Web Job App Services also we need to follow the same procedure

- 1) On and save managed service Identity
- 2) Azure active directory application registration binder/webjob
- 3) application settings – adding keyvalut url, application and secret ids.
- 3) Adding application to access policy of keyvault..

CRM Configuration for Printall :

Navigate to Settings → integration Configuration → search for “PrintAllApplicationURL”

For Config Value : Azure portal > IMSAppPrintAll following with Unique org id > Overview > URL

CRM Configuration for Binder :

Settings → integration Configuration → search for “PrintBinderURL”

For Config Value : Azure portal > IMSAppBinder following with Unique org id > Overview > URL + /CreateBinderPrint.aspx?ID=

Ex: <https://imsappbinder820f9.azurewebsites.net/CreateBinderPrint.aspx?ID=>

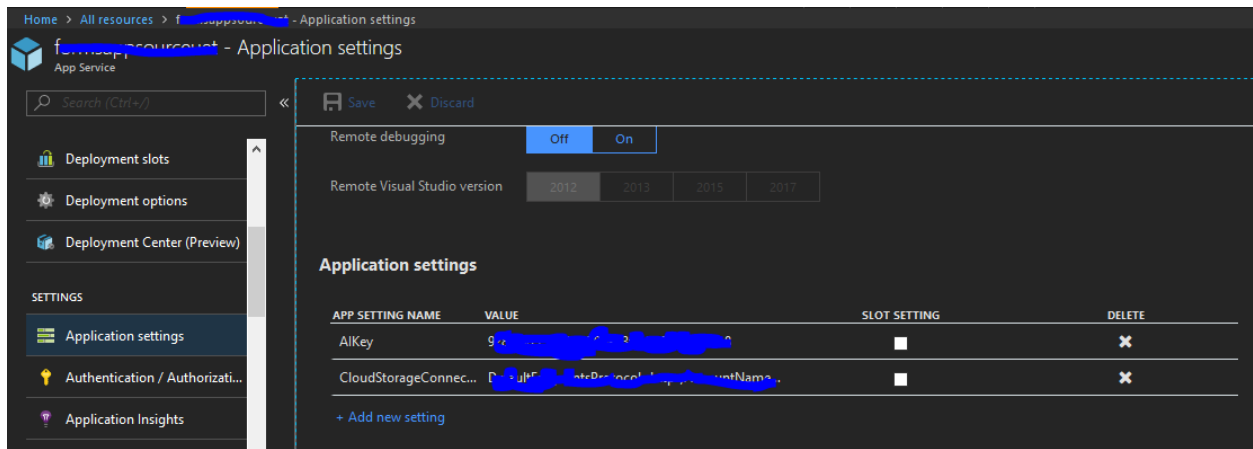
Form Configurations:

- 1) For Forms App (**IMSAppForms**) service need to add below items on app settings:

AIKey : (navigation : IMSAppStorageAppInsight<xxxxx>-- overview – Instrumentation key)

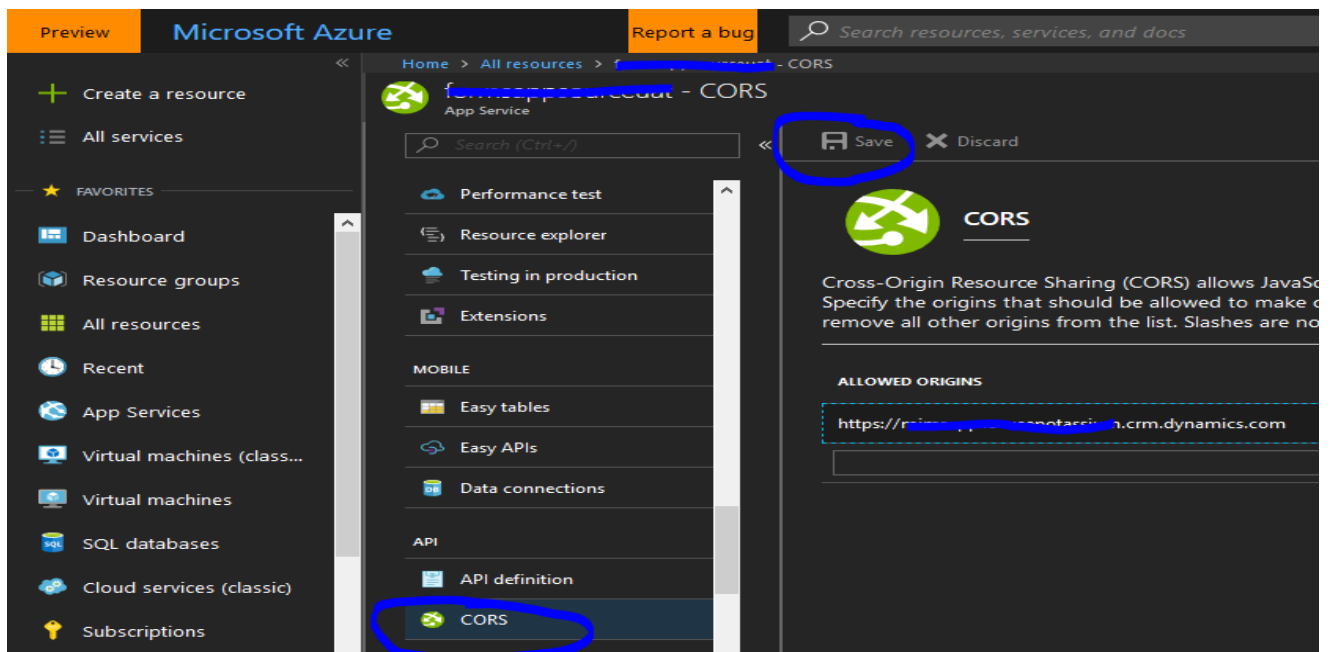
- a. **CloudStorageConnectionString**: (navigation : imsappformstrge<xxxxx> – Access keys – Connectionstring)
- b. Save the Settings.

Note: Remove text “**;EndpointSuffix=core.windows.net**” form the CloudStorageConnectionString



Adding Application Settings on App service.

IMP Note: Target CRM instance URL must declare under Forms App (IMSAppForms) → ss CORS



CRM side Form Management related configuration :

Settings → integration Configuration → search for “App Insights Instrumentation Key “

For the “App Insights Instrumentation Key” record we should provide “Config Value”

For Config Value :

Azure portal > IMSAppStorageAppInsight following with Unique org id > Overview > Instrumentation Key

Settings → integration Configuration → search for “Forms Service API URL”

For the “Forms Service API URL” record we should provide “Config Value”

For Config Value :

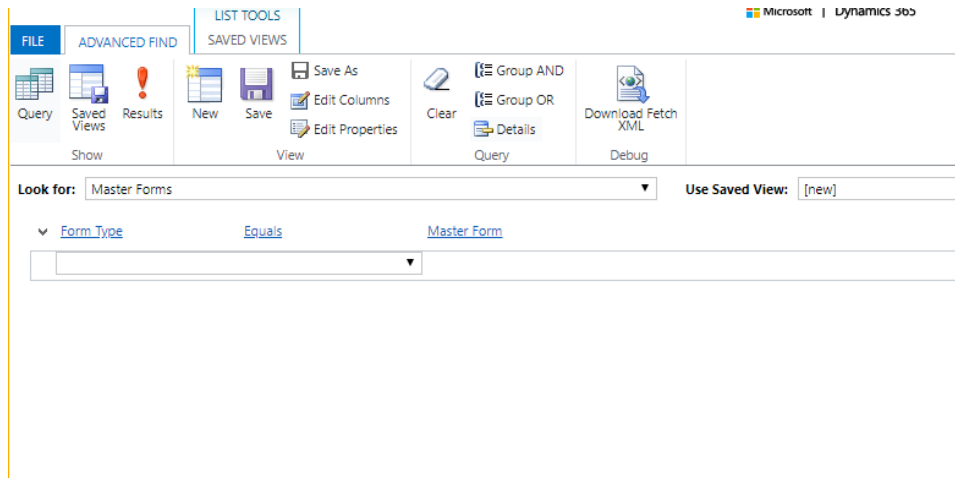
Azure portal > IMSAppForms following with Unique org id > overview > URL

After url add **/api/v1/forms/** for Config Value

ex: <https://imsappforms82f09.azurewebsites.net/api/v1/forms/>

Update Master Forms Records :

Get all the Master Forms with “FormType” value Equals to “MasterForm” as shown below



The screenshot shows the Microsoft Dynamics 365 Advanced Find interface. The 'Look for' dropdown is set to 'Master Forms'. The 'Form Type' field is expanded, showing 'Equals' and 'Master Form'. The 'Use Saved View' dropdown is set to '[new]'. The interface includes a 'FILE' tab, 'ADVANCED FIND' and 'LIST TOOLS' tabs, and a 'SAVED VIEWS' section. The 'FILE' tab contains icons for Query, Saved Views, Results, New, Save, Edit Columns, Edit Properties, Clear, Group AND, Group OR, Details, Download Fetch XML, and Debug. The 'ADVANCED FIND' tab contains icons for Save As, Edit Columns, Edit Properties, Clear, Group AND, Group OR, Details, Download Fetch XML, and Debug. The 'LIST TOOLS' tab contains icons for Save As, Edit Columns, Edit Properties, Clear, Group AND, Group OR, Details, Download Fetch XML, and Debug. The 'SAVED VIEWS' section contains a 'Look for' dropdown and a 'Use Saved View' dropdown.

To change the URL, follow below steps

1) Take new Master Form and fill all the fields as it is except URL field

2) Save the form (Do Not Click “Save and Close” Button)

Follow the step 1 and 2 for all the Master Forms

Now able to see the URL with forms azure application name as below

Example : “G-28” Master Form

MASTER FORMS : INFORMATION

G-28

Owner*

General

Name *	G-28	Form Logical Name *	mims_g28
Form Type	Master Form		
USCIS Published On *	5/23/2018		
USCIS Expires On *	5/31/2021		
Usage Type *	Mostly		
URL	https://imsappformse098b.azurewebsites.net/versions/2021-05-31/create		
CRM Form Id	EC103FE5-5D85-4C59-AADF-87E1139DD55B		
Description			

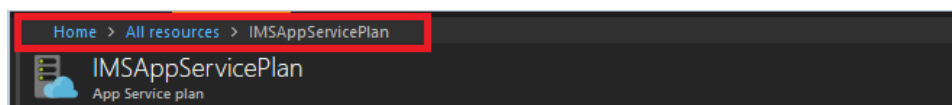
6.TroubleShooting Details

Follow below steps if any of the required components were not installed appropriately during deployment. Failures may occur if any of the pre-requisites not provided, network disconnections, Azure components take more time than anticipated to deploy on cloud or any other unexpected failures. Follow the below steps to resolve them manually if not completed automatically by Dynamics CRM OOB tool Package Deployer.

6.2 Azure Applications

6.2.1 Web Service Plan

If IMSAppServicePlan application is not created in azure as shown below



Create the AppService Plan with name of 'IMSAppServicePlan' as shown below

Home > New App Service Plan

New App Service Plan

Create a plan for the web app

* App Service plan
IMSAppServicePlan ✓

* Subscription
Free Trial ▼

* Resource Group ⓘ
☐ Create new ☒ Use existing
TestMimsResourceGroup ▼

* Operating System
Windows ▼

* Location
Central US ▼

* Pricing tier
S1 Standard >

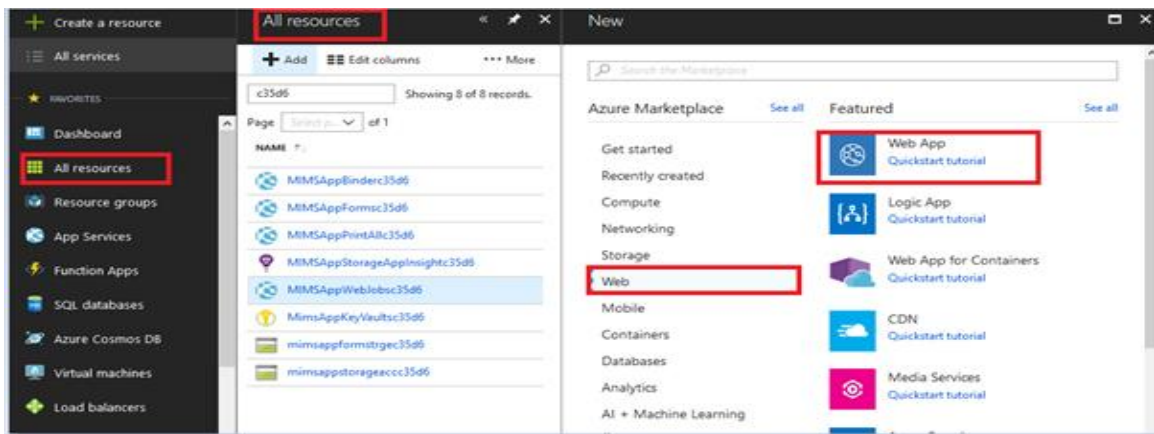
Create Automation options

6.2.2 Web Jobs

If IMSAppWebJobs followed by CRM organization unique name application is not created in azure as shown below

Create new webapp as shown below

- Go To -> All Resources -> Web -> Web App

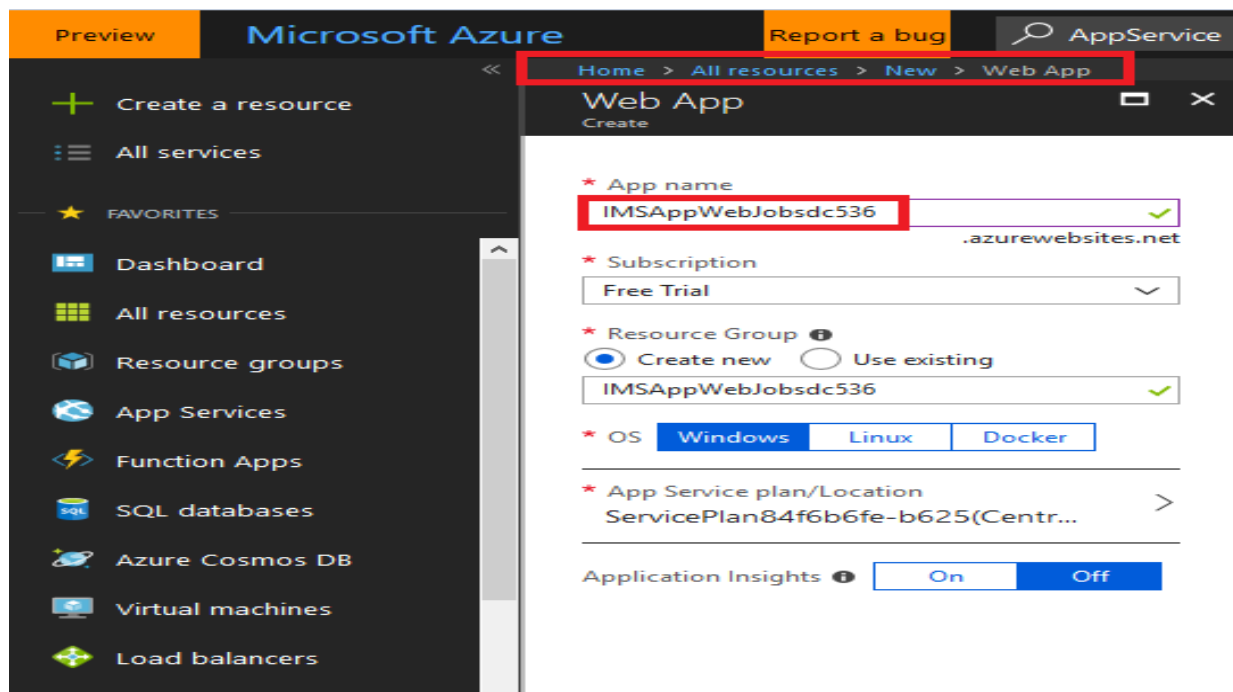


Create new application with name as below

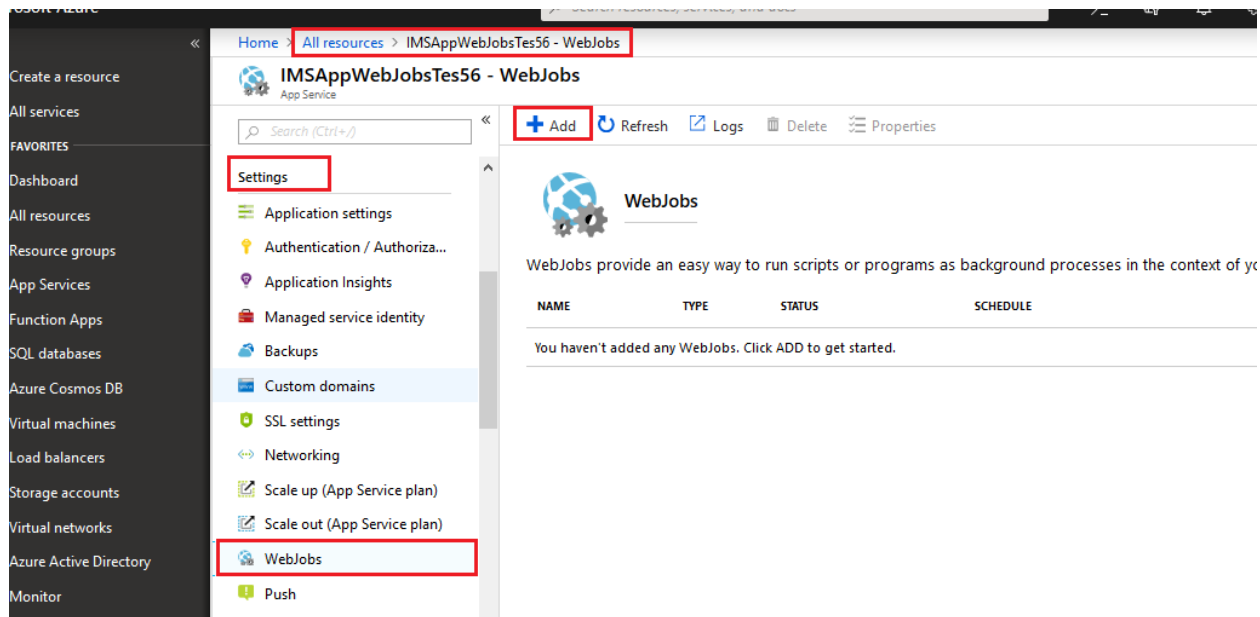
IMSApWebJobs followed by five characters of an organisation unique name as shown below

Example: Organisation unique name is “orgdc536fg”, and then the application name is like

“IMSApWebJobsdc536” as shown below

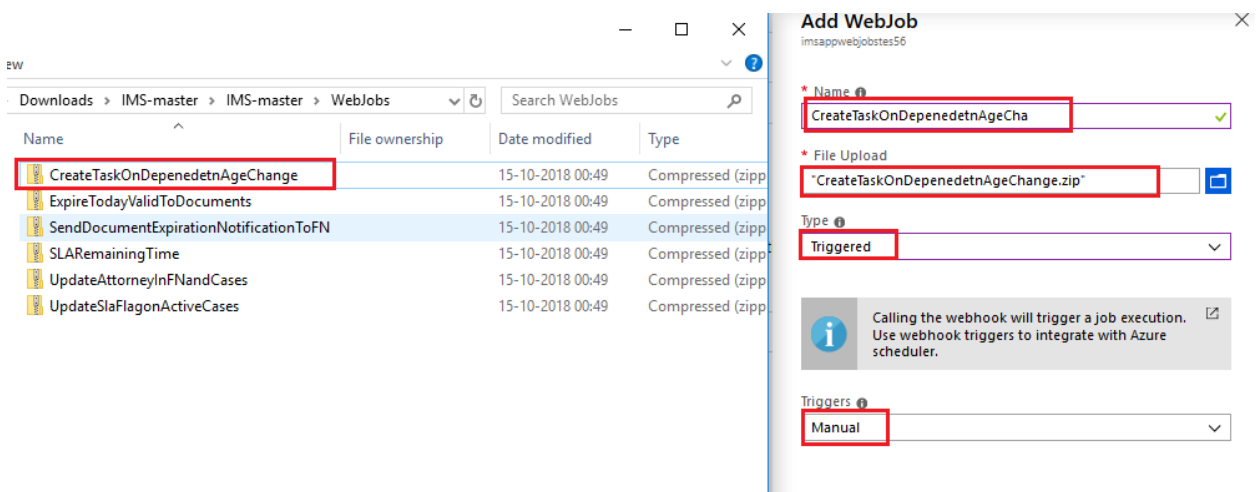


Navigate to “IMSApWebJobs<xxxxx>” -> Webjobs as shown below



- Create the below web jobs and upload the folders as shown below.
- All the web jobs exist in “WebJobs” Folder from GitHub (<https://github.com/microsoftappsourc/IMS/tree/master/WebJobs>). They need to be uploaded while creating web jobs.

1. CreateTaskOnDepenedentAgeChang



- ON File Upload -> upload the webjob file..
- Created the webjob as shown below.

Home > All resources > IMSAppWebJobsTes56 - WebJobs

IMSAppWebJobsTes56 - WebJobs

App Service

Search (Ctrl+/)

Settings

- Application settings
- Authentication / Authoriza...
- Application Insights
- Managed service identity
- Backups
- Custom domains
- SSL settings
- Networking
- Scale up (App Service plan)
- Scale out (App Service plan)

+ Add Refresh Logs Delete Properties

Continuous and scheduled CRON webjobs require 'Always on' to be enabled for your app. →

WebJobs

WebJobs provide an easy way to run scripts or programs as background processes in the context of your app.

NAME	TYPE	STATUS	SCHEDULE
CreateTaskOnDepenedetnAgeCha	Triggered	Ready	0 0 */1 ***

- Select the WebJob and Click on Run Button to execute the WebJob.

Home > All resources > IMSAppWebJobsTes56 - WebJobs

IMSAppWebJobsTes56 - WebJobs

App Service

Search (Ctrl+/)

Settings

- Application settings
- Authentication / Authoriza...
- Application Insights
- Managed service identity
- Backups
- Custom domains
- SSL settings
- Networking
- Scale up (App Service plan)
- Scale out (App Service plan)

+ Add Refresh Logs Delete **Run** Properties

Continuous and scheduled CRON webjobs require 'Always on' to be enabled for your app. →

WebJobs

WebJobs provide an easy way to run scripts or programs as background processes in the context of your app.

NAME	TYPE	STATUS	SCHEDULE
CreateTaskOnDepenedetnAgeCha	Triggered	Ready	0 0 */1 ***

Repeat the steps for all the below webjobs in the "WebJobs" Folder

1. ExpireTodayValidToDocuments
2. SendDocExpirationNotification
3. SLARemainingTime
4. UpdateAttorneyInFNandCases
5. UpdateSlaFlagonActiveCases

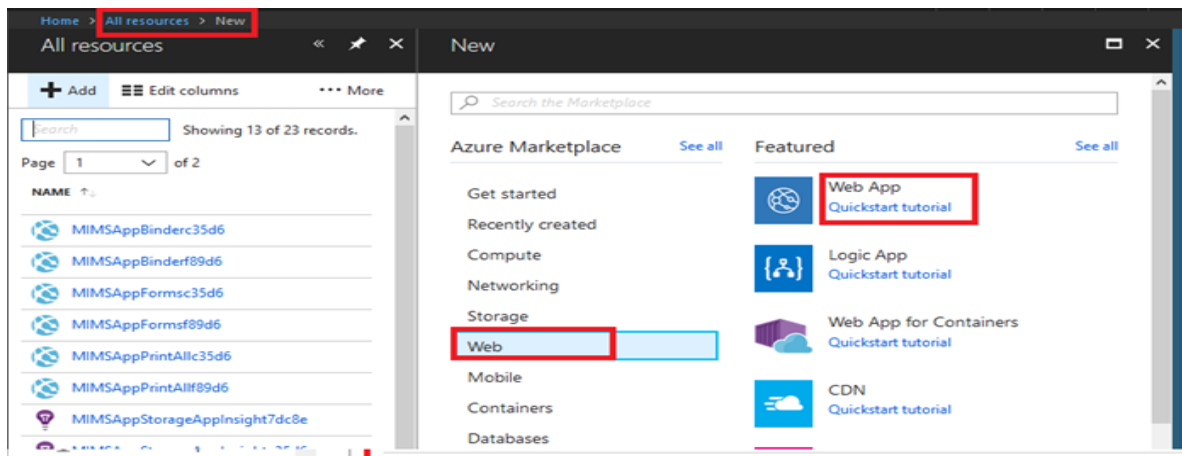
ew

Downloads > IMS-master > IMS-master > WebJobs			Search WebJobs
Name	File ownership	Date modified	
CreateTaskOnDepenedetnAgeChange		15-10-2018 00:49	
ExpireTodayValidToDocuments		15-10-2018 00:49	
SendDocumentExpirationNotificationToFN		15-10-2018 00:49	
SLARemainingTime		15-10-2018 00:49	
UpdateAttorneyInFNandCases		15-10-2018 00:49	
UpdateSlaFlagonActiveCases		15-10-2018 00:49	

6.2.3 Web Applications

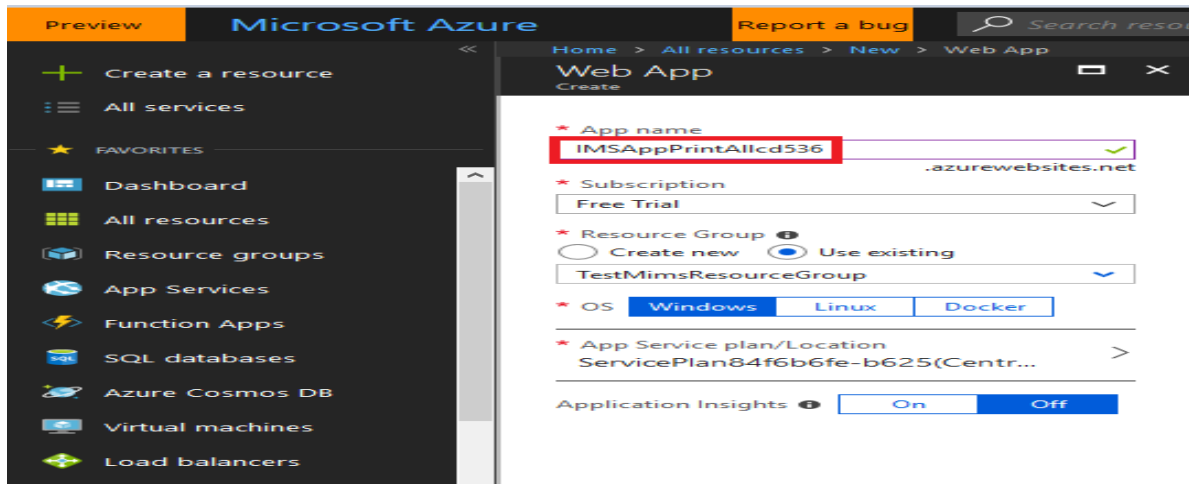
IMSAppPrintAll Application

- If IMSAppPrintAll followed by organization unique name application is not created in azure
- Create Webapp in azure as shown below



- Create "IMSAppPrintAll" followed by five characters of an organization unique name as shown below

Example: "IMSAppPrintAlldc536"



- Run the below PowerShell command as shown below

```
$subscriptionId = " #Azure Subscription ID
```

```
$resourceGroupName = " #Azure Resource Group Name
```

```
$IMSAppSourcePrintAll_Path = " # Print All Application Path from WebApplications folder downloaded from the GitHub  
(https://github.com/microsoftapps/IMS) as shown below image
```

```
$IMSAppPrintAll = " # Print All Application name, Example: 'IMSAppPrintAllcd536'
```

Add-AzureAccount

Select-AzureSubscription -SubscriptionId \$subscriptionId

Publish-AzureWebsiteProject -name \$IMSAppPrintAll -package \$IMSAppSourcePrintAll_Path

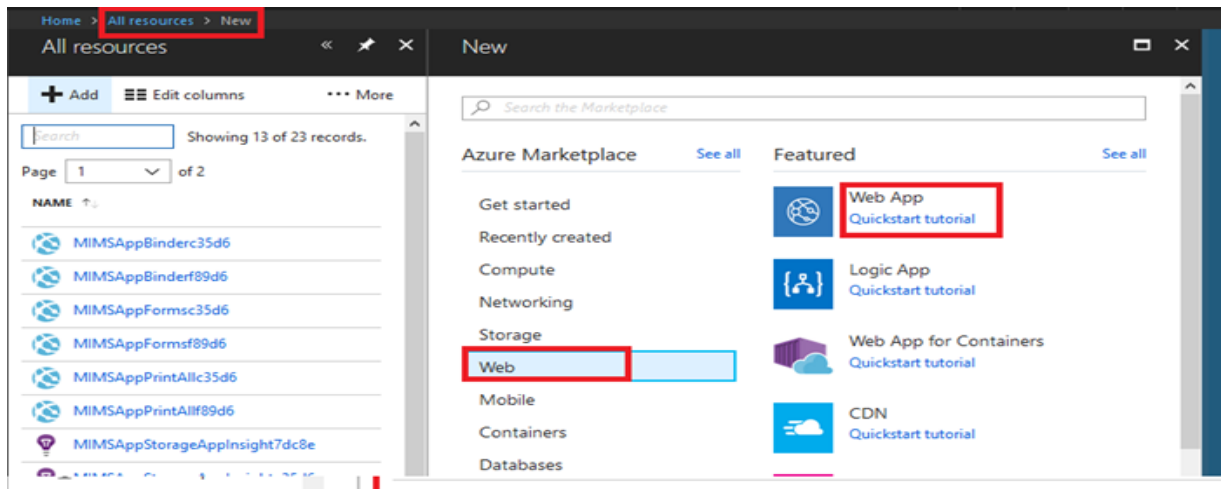
w

Downloads >	IMS-master > IMS-master > WebApplications				
Name	File ownership	Date modified	Type	Size	
IMSAPPBinder		15-10-2018 00:49	Compressed (zipp...	51,135 KB	
IMSAppFormsManagement		15-10-2018 00:49	Compressed (zipp...	22,581 KB	
IMSAppPrintAll		15-10-2018 00:49	Compressed (zipp...	45,693 KB	

- Script has to be executed without getting error in PowerShell

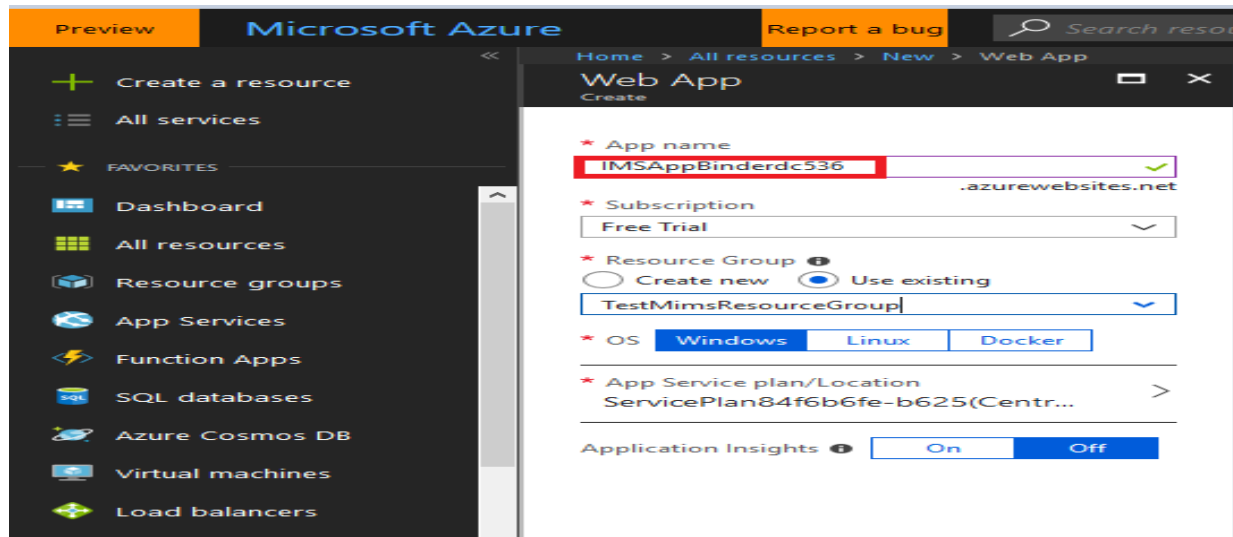
IMSAppBinder Application

- If IMSAppBinder followed by organization unique name application is not created in azure
- Create Webapp in azure as shown below



- Create “IMSAppBinder” followed by five characters of an organization unique name as shown below

Example: “IMSAppBinderdc536”



Run the below PowerShell command as shown below

```
$subscriptionId = " #Azure Subscription ID
```

```
$resourceGroupName = " #Azure Resource Group Name
```

`$IMSAppSourceBinder_Path = " # Binder Application Path from WebApplications folder downloaded from the GitHub (https://github.com/microsoftappsource/IMS) as shown below imag`

`$IMSAppBinder =" # Binder Application name, Example: 'IMSAppBinderdc536'`

Add-AzureAccount

Select-AzureSubscription -SubscriptionId \$subscriptionId

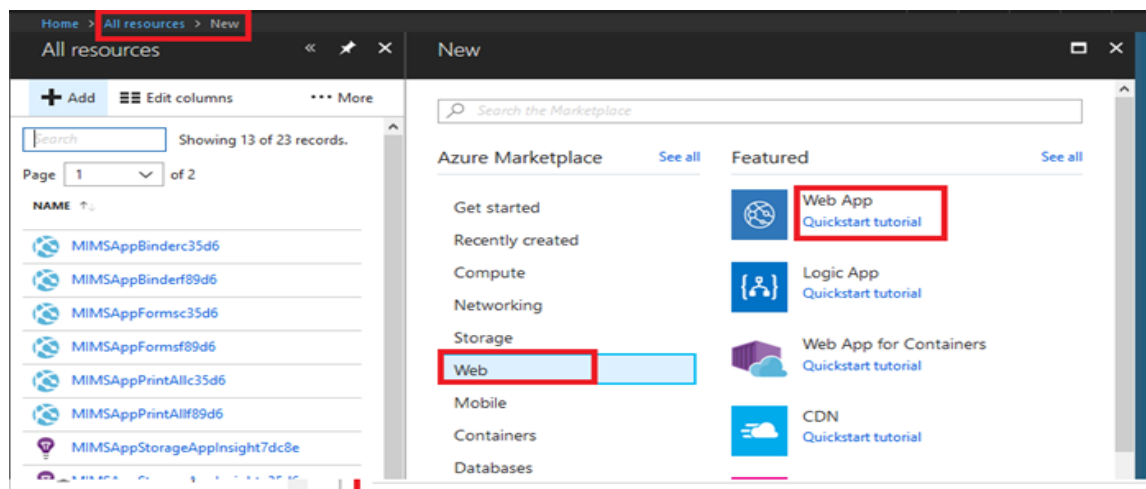
Publish-AzureWebsiteProject -name \$IMSAppBinder -package \$IMSAppSourceBinder_Path

Downloads > IMS-master > IMS-master > WebApplications				
Name	File ownership	Date modified	Type	Size
IMSAPPBinder		15-10-2018 00:49	Compressed (zipp...	51,135 KB
IMSAppFormsManagement		15-10-2018 00:49	Compressed (zipp...	22,581 KB
IMSAppPrintAll		15-10-2018 00:49	Compressed (zipp...	45,693 KB

- Script has to be executed without getting error in PowerShell

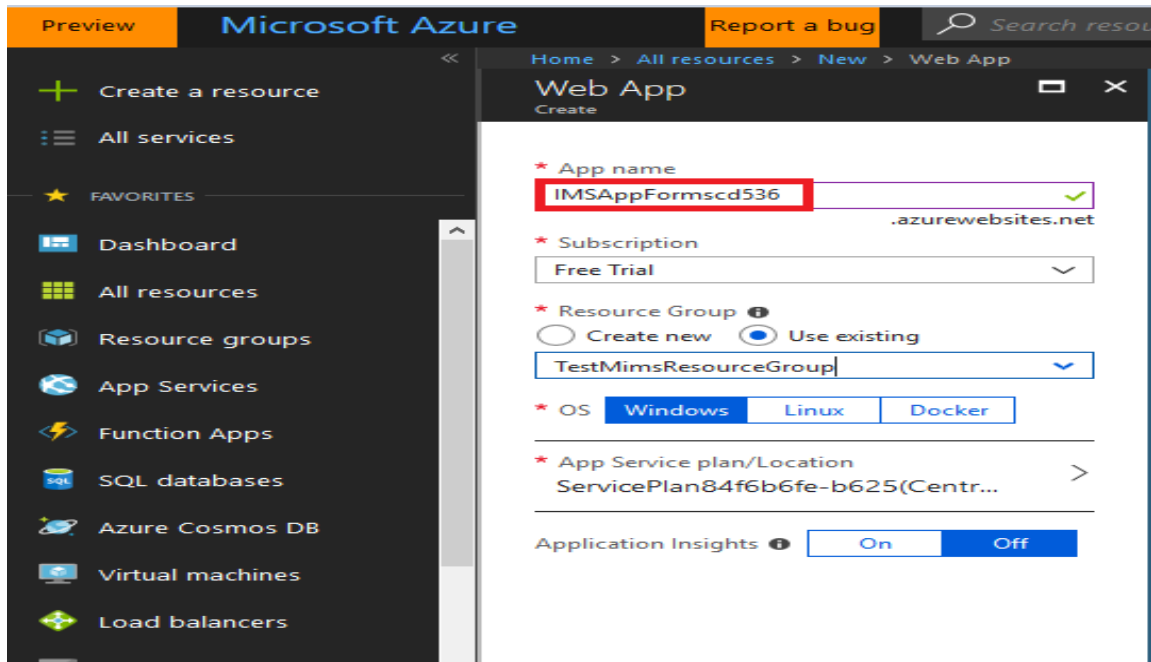
IMSAppForms Application

- If IMSAppForms followed by organization unique name application is not created in azure
- Create Webapp in azure as shown below



- Create "IMSAppForms" followed by five characters of an organization unique name as shown below

Example: "IMSAppFormsdc536"



Run the below PowerShell command as shown below

```
$subscriptionId = " #Azure Subscription ID
```

```
$resourceGroupName = " #Azure Resource Group Name
```

```
$IMSAppSourceForms_Path = " #Forms Application Path from WebApplications folder downloaded from the GitHub  
(https://github.com/microsoftappsource/IMS ) as shown below image
```

```
$IMSAppForms = " #Forms Application name, Example: 'IMSAppFormsdc536'
```

```
Add-AzureAccount
```

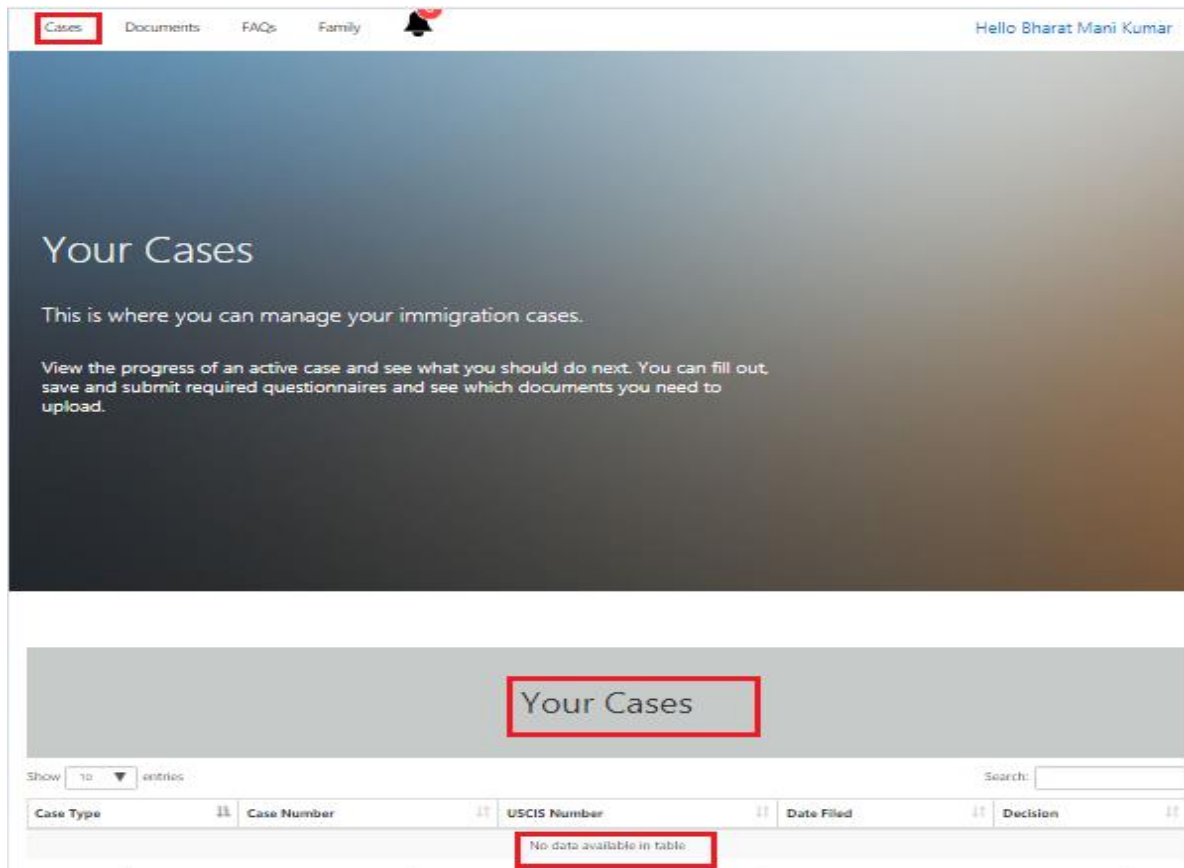
```
Select-AzureSubscription -SubscriptionId $subscriptionId
```

```
Publish-AzureWebsiteProject -name $IMSAppForms -package $IMSAppSourceForms_Path
```

Downloads > IMS-master > IMS-master > WebApplications					
Name	File ownership	Date modified	Type	Size	
IMSAPPBinder		15-10-2018 00:49	Compressed (zipp...	51,135 KB	
IMSAppFormsManagement		15-10-2018 00:49	Compressed (zipp...	22,581 KB	
IMSAppPrintAll		15-10-2018 00:49	Compressed (zipp...	45,693 KB	

6.3 FN Portal

1. Not able to see the Foreign National Cases as shown below



Resolution:

- Navigate to CRM -> Portals -> Web Roles -> Administrators -> Foreign Nationals
- Add the Foreign National to the administrator role
- Navigate to CRM -> Portals -> Web Roles -> Administrators -> Entity Permissions
- Add the "FN - Cases" Entity Permission to the administrator role
- Repeat all the above steps for the Documents, FAQ, Family and Tasks when you are not able to see the related entity records

6.4 Questionnaire Portal

1. Not able to create record through portal and getting the permissions issues as shown below

HCap Questionnaire

15%

Passport Information

If you are a citizen of more than one country, please add passport information for all countries of citizenship.

Do you hold a valid passport? *

Yes

Please enter details of all current, unexpired valid passport(s).

Have you been issued passports from more than one country?

Passport Number ↑	Date Passport Issued	Date Passport Expires	Issue Country/State/City
You don't have permissions to view these records.			

PREVIOUS NEXT

Resolution:

- Navigate to CRM -> Portals -> Entity Permissions
- Open "Birth & Passport Information" Entity Permission record
- Add the Administrator Web Role to the "Birth & Passport Information" Entity Permission record

7. Uninstalling Immigration AppSource System

- Navigate to CRM -> Settings -> Solutions
- Select the "IMSAppSource" solution and delete the solution

The Solution related entities data will be deleted by the solution.

Note: Portal related records should delete by the user manually.

8. Aspose License SetUp

- Aspose license adding to application process:
- Once license purchased we need to add "Aspose.Total.lic" file to the "IMSAppPrintAll" & "IMSAppBinder" application Publish the application.

To download the file:

1) Go to My Orders and Quotes.

This page lists your order history with Aspose. In the end of column of the grid next to each order is a Review link.

2) Click Review for the order you want to download a license for.

The details for that order are displayed.

3) At the bottom of the page will be a link titled Download License.

4) Click Download License at the bottom of the page.

A dialogue appears to allow you to select where to save the license.

<https://purchase.aspose.com/policies/download-license>

Once file downloaded unzip "IMSAppPrintAll" & "IMSAppBinder" applications and place the file as shown in below path location.

Name	File ownership	Date modified	Type	Size
bin		9/18/2018 7:24 PM	File folder	
ApplicationInsights		11/25/2017 6:02 PM	XML Configuratio...	6 KB
Aspose.Total.lic		9/18/2018 7:24 PM	VisualStudio.lic.d3...	1 KB
aspnetcoreapp1.0		9/9/2017 3:16 PM	ASP.NET Server Pa...	1 KB
packages		4/17/2018 1:22 PM	XML Configuratio...	3 KB
PrecompiledApp		9/18/2018 3:30 PM	XML Configuratio...	1 KB
Web		9/18/2018 3:30 PM	XML Configuratio...	2 KB

Product: Aspose. Total for .NET

License file name : Aspose.Total.lic

End of Document